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1996-1997



TOURISM AND FILM MARKETING PLAN

1996 — 1997

Travel Montana ▼ Montana Department of Commerce

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FORWARD

Let me begin by congratulating everyone involved in Montana's tourism industry for their hard work and the commitment that has made tourism one of our state's basic industries and jobs producer. Our Administration has focused its efforts on developing Montana's economic independence. We are committed to helping Montanans take control of their own destiny by actively steering the state's economic growth, instead of waiting for outside forces to lead. Montana's healthy tourism industry is a positive example of the benefits inherent in this approach.

There is a growing sense of maturity within the Montana tourism industry. The focus has moved from simply attracting visitors to Big Sky Country to ensuring that our guests have a quality experience during their stay. The new tourism infrastructure improvement programs are investing Montana's tourism dollars into the improvement of Montana's community facilities. These improvements benefit our residents as well as our visitors. We are using new technologies and Montana's tourism team continues to pursue effective and imaginative approaches to sustainable growth for the industry. I applaud these efforts and reiterate our Administration's support for the good works of Montana's tourism industry.

Good luck and best wishes in the year ahead.



MARC RACICOT
Governor

Last year, 1995, was an important year for Montana's tourism industry and the Montana Commerce Department's tourism promotion and development program, Travel Montana. It was not only another record year for visitors and visitor expenditures, but it was a year in which Montana began reinvesting—in a very visible, focused way—its tourism dollars into Montana's communities.

Through the Tourism Infrastructure Investment Program, \$320,000 of the state's accommodation tax proceeds were invested in important historical and cultural tourism projects in four Montana communities. This year we will increase that investment to a minimum \$350,000 for tourism-related projects in other communities across the state. Another \$180,000 has been committed for projects in nine other Montana communities that have completed or are in the process of completing Travel Montana's Tourism Assessment Program. Each of these projects add to Montana's quality of life and help us to preserve the things that make Montana such a special place to live in and to visit. They also stimulate important economic activity at the local and state levels.

These tourism investment programs combined with Travel Montana's efforts to attract feature films and TV programs, group tours, international travelers, conventions, and awareness of our state as a travel destination creates a very balanced approach. It is an approach which has served Montana's tourism industry well and one we are committed to continuing for the benefit of the people of Montana.

We look forward to working with you.



JON NOEL
Director, Montana Department of Commerce

INTRODUCTION

Last year I had the opportunity to travel to almost all of our 56 counties to meet with Montanans from all walks of life. While our state covers an immense area and has a varied geography, I found a thread of commonality wherever I went. Montanans are a diverse, proud group of people, with a strong belief in community and sense of “place.” There seems to be a universal feeling among Montanans that our state is really and truly the last best place, and that we need to ensure that this special quality is protected and not lost.

What is it about Montana that inspires these strong feelings? It seems to me that our relationship with our state has been shaped by its land. Incredible beauty, broad open vistas, habitat that the grizzly and trout can call home influence us all. Our changeable weather and our relative isolation from major population centers have shaped Montanans into a hardy breed, a people who have a rich heritage of community involvement who go out of their way to help neighbors and strangers in need. While our tourism research shows that visitors come to Montana for a myriad of reasons, those that return (nearly 80% of our yearly total) say they come back because of the people. They too sense that this land of the Big Sky offers each of us a chance to expand our horizons, discover personal adventures, and experience the grandeur of nature at its finest.

This marketing plan focuses on the nuts and bolts of how Travel Montana will carry out its mission for the coming fiscal year. Travel Montana does not work in a vacuum. Our efforts are guided by the Governor’s Tourism Advisory Council and our tourism industry partners. We work in concert with the tourism regions, the CVBs and numerous federal and state agencies in carrying out our program objectives. These are detailed throughout the report.

As a partner in Montana’s second largest industry, I hope you will see the commitment and vision we have in developing tourism in a way that augments our culture, history, and economy. I firmly believe that the finest legacy we can hand down to the future generations of Montanans is an unspoiled environment, a sound economic base, and a continuing sense of community and place. Properly planned, reasonably promoted, and with continuing investments in our communities and their infrastructure, Montana will be a place worth visiting in years to come. Our commitment is to work hard and accomplish these goals, never losing sight of the fact that our work is done on behalf of the citizens of Montana.



MATTHEW T. COHN
Director, Travel Montana



TOURISM ADVISORY COUNCIL

The Montana Tourism Advisory Council (TAC) was created by statute in July of 1987, as a result of the inception of the Montana lodging tax. The Council is composed of no fewer than 12 members from Montana's private-sector travel industry, with representation from each of Montana's six tourism regions and a representative from among the Indian tribal governments. Members of the Council are appointed by the governor and serve staggered three-year terms, subject to replacement at the discretion of the governor.

A chairperson and a vice chairperson are elected, or re-elected, by the Council during the first meeting of each fiscal year, beginning July 1. Members must have served on the Council for at least one year to be eligible for election to these posts. The Council meets three times annually and/or as needed.

THE DUTIES OF THE COUNCIL ARE AS FOLLOWS:

- Advise the governor on matters which relate to travel and tourism in Montana.
- Set policies and guide the efforts of Travel Montana, Department of Commerce.
- Oversee distribution of funds and set guidelines for nonprofit regional tourism corporations and nonprofit convention and visitors bureaus.
- Prescribe allowable administrative expenses for which accommodations tax proceeds may be used by nonprofit regional tourism corporations and nonprofit convention and visitors bureaus.
- Direct the university system's travel research and approve all projects prior to their being undertaken.

TOURISM ADVISORY CONTACTS

Maureen Averill, Chair

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Lisa Perry, Vice Chair

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Larry McRae

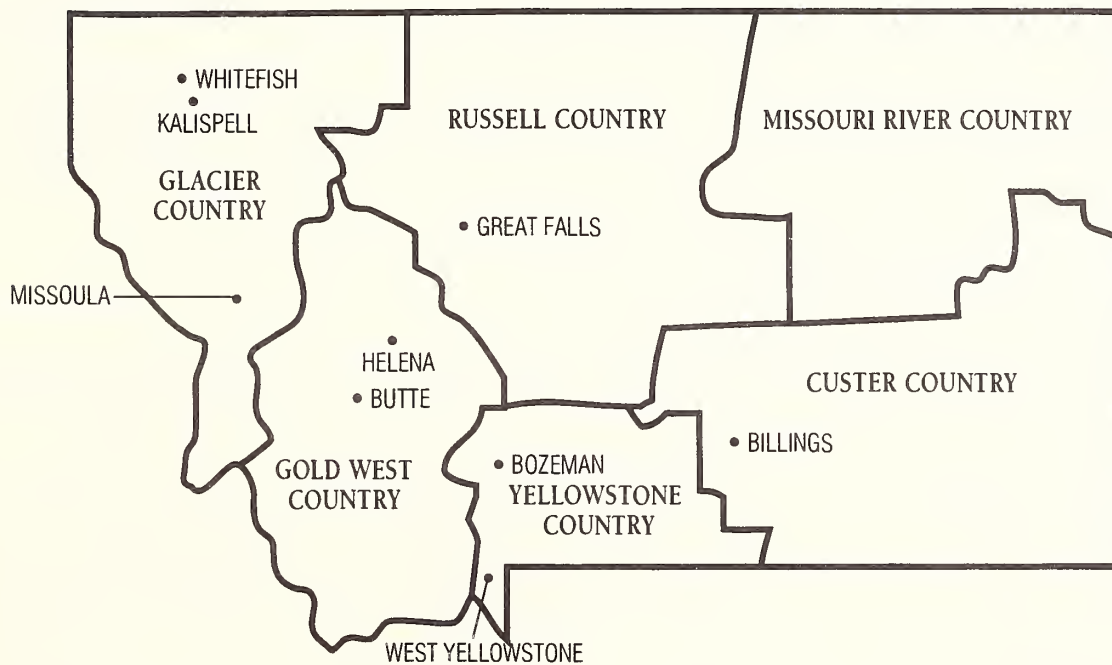
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CERTIFIED TOURISM ORGANIZATIONS

Twenty-five percent of Montana's state tourism budget is legislatively allocated to 15 certified organizations. These organizations are private, nonprofit corporations that market specific regions and cities within the state. Under the direction and guidance of the Tourism Advisory Council, these organizations submit annual marketing plans which seek to both increase visitation and visitors' lengths of stay. Marketing plans for each of the tourism organizations are on file at Travel Montana.



TOURISM REGIONS

CUSTER COUNTRY

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MISSOURI RIVER COUNTRY

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WHITEFISH

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406-862-3501

TOURISM FUNDING

Our state's dramatic tourism growth since 1988 is directly tied to the Montana Legislature's creation, in 1987, of a dedicated accommodations tax. Montana funds its travel and tourism marketing programs solely from this source, **with no dollars from the general fund**. The existence of this funding, and the valuable promotional efforts it has allowed, are essential to maintaining and increasing tourism growth into the future, with widespread economic benefits to all Montanans.

| | |
|---|-------------|
| Projected Lodging Tax Revenues FY 97 | \$9,350,000 |
| State Parks Operations/Maintenance - 6.5% | (\$607,750) |
| Department of Revenue - 3% (Tax collection & return of tax paid by state employees) | (\$280,500) |
| University System - 2.5% (Tourism and Recreation Research) | (\$233,750) |
| Historical Society - 1% (Historical Sites and Signage) | (\$93,500) |
| Available for Department of Commerce - 87% (Regions/CVBs and Travel Montana) | \$8,134,500 |

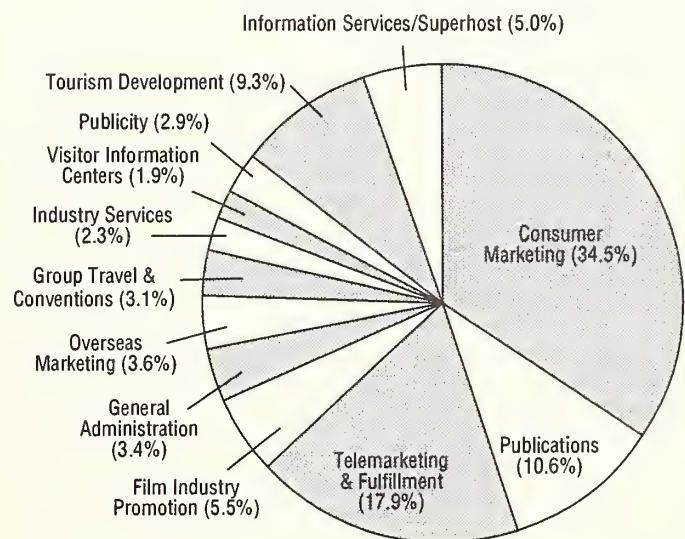
DEPARTMENT OF COMMERCE PROJECTED FY 97 BUDGET

| | |
|----------------------------|--------------|
| Regions/CVBs (25%) | \$ 2,033,625 |
| Travel Montana (75%) | \$6,100,875 |

TRAVEL MONTANA PROJECTED FY 97 BUDGET

| | |
|---|--------------------|
| Funds available from Accommodations Tax | \$6,100,875 |
| Income from ad sales, co-op projects, training, etc | \$395,500 |
| Community & infrastructure grant programs | (\$485,000) |
| Legislatively mandated support for the Montana Trade Program | (\$ 200,000) |
| Legislatively mandated support for tours of the Capitol & Original Governor's Mansion Restoration | (\$75,000) |
| Total Funds Available | \$5,811,375 |

HOW TRAVEL MONTANA FUNDS ARE SPENT



TRAVEL MONTANA OVERVIEW

Director ▼

Matthew T. Cohn
Director of Tourism

Matthew is responsible for directing all activities of Travel Montana, promoting Montana as a year-round travel destination and leads the state's tourism development, multidimensional marketing, and film industry promotion efforts. Matthew ensures the tourism perspective is considered in matters of policy at the state level. He works on regular basis with tourism regions and organizations, chambers, the State Legislature, U.S. Congressional members, local governments and the press to create a positive environment for tourism and film location growth in Montana.

Administration ▼

Janice Wannebo
Administrative Assistant

Providing direct support to the travel director, Janice assists with coordination of Travel Montana's many activities and ensures the smooth flow of information. During the director's absence, she expedites all contacts and correspondence from members of the public, tourism industry and other government agencies. Janice serves as liaison with staff on special projects, and is responsible for personnel matters, private-sector contracts, the research library and presentation material. She handles varied special projects, compiles travel data, and responds to information requests.

Tourism Development ▼

Clint Blackwood
Tourism Development Coordinator

Working to assure internal support for tourism in Montana, Clint interacts with various state and federal agencies and private-sector interests related to tourism infrastructure development. He coordinates and facilitates cooperative marketing efforts between organizations as diverse as the Department of Fish, Wildlife & Parks, U.S. Forest Service and Department of Transportation. As Tourism Development Coordinator, Clint is involved in long-range strategic planning, tourism assessment, interagency and public relations negotiations on behalf of Travel Montana.

Superhost/Electronic Information Services ▼

Shawn Peterson
Superhost/Information Services Manager

The Superhost program provides customer service training and gets businesses involved in tourism. Through the program, employees at motels, campgrounds, restaurants, gas stations, stores, chambers and a host of others learn how to increase visitors' length of stay and encourage their return. The program also encourages communities to develop local sources of visitor information. Shawn also directs the development and implementation of electronic information systems including database development, the Montana Explorer kiosk system, and Travel Montana's Internet services.

Electronic Information Services ▼

Thurston Elfstrom
Information Services Coordinator

Providing technical support to Travel Montana as well as database administration, Thurston is steering Travel Montana down the "Information Superhighway." He develops and maintains the databases that have become the lifeblood of Travel Montana. Additionally, Thurston interacts with other state and federal agencies to develop a statewide multimedia information system that will enhance visitor options. Thurston is continually evaluating new technology and information services in order that Travel Montana may provide the highest standards of information services to visitors, travel operators, travel counselors, and Montana residents.

Group Travel/Conventions ▼

MaryEtta Sodja
Group Travel Manager

Marketing Montana to group tour operators and convention planners has MaryEtta planning itineraries, providing travel counseling, attending targeted trade shows and performing other duties to encourage groups to visit Montana and stay longer. MaryEtta develops and distributes the state's Group Tour Planning Guide and manages regular mailings of *Montana Magazine* and a Montana calendar to key tour operators. Her work also includes organizing familiarization trips for group tour operators. MaryEtta is also responsible for the development and implementation of Montana's convention promotion, including a direct mail campaign, *Meeting Planner's Guide* and the Invite-A-Convention program.

Publicity ▼

Victor Bjornberg *Publicity Coordinator*

Soliciting news coverage of Montana and responding to print and broadcast journalists interested in covering Montana as a tourism destination are central to Victor's many responsibilities. Along with distributing a quarterly newsletter and releasing ideas for potential feature articles, Victor serves as a resource for writers, news media, TV producers and others. He works with the state's tourism regions in developing story ideas, gathering information and assisting the travel media that visit the state. Victor also coordinates writer familiarization trips and handles instate media relations for Travel Montana.

Publications ▼

Donnie Sexton *Publications Manager*

Directing production of Travel Montana's numerous publications has Donnie gathering facts, writing, editing, selecting photos, scheduling and much more. She is responsible for the *Montana Winter Guide*, *Indian Reservations Brochure*, *Fishing Guide*, *Vacation Guide*, *Highway Map*, *Travel Planner* and *Summer and Winter Calendars*. She coordinates production of the *Movie Location Guide*, *Group Tour Guide*, *Meeting Planner's Guide* and other printed material such as business cards, letterhead and newsletters. Working with a publishing company, Donnie directs creative design; oversees layout, proofing, and printing; makes photo selections; and negotiates rights with photographers. As time allows, she is in the field taking images for use in the Travel Montana stock photo library and publications.

Publications/Publicity ▼

Marlee Iverson *Publications/Publicity Assistant*

Corresponding regularly with over 2,000 hotels, motels, resorts and recreational facilities, Marlee compiles information vital to the accuracy of Montana's travel literature. She also serves as photo and video librarian—lending slides, videos and photos to tourism groups, publications and others with an interest in what Montana has to offer. Her research work is a valuable part of Travel Montana's efforts to provide national and international journalists and program producers with the information they need regarding Montana's travel opportunities. Marlee is also responsible for gathering information for the summer and winter calendars.

Overseas Marketing ▼

Pam Gosink *Overseas Marketing Manager*

Creating a demand for what Montana has to offer is a primary goal of Pam's activities in Japan, Taiwan, the United Kingdom, France, the Netherlands, Belgium and Germany. She encourages overseas tour decision makers to include Montana in their programs, and assists in the planning of group and FIT (individual) travel in Montana. Persuading key travel trade representatives and the news media to take familiarization trips to experience Montana tourism opportunities firsthand is also an important part of her job. By attending trade shows and trade missions, Pam and Montana suppliers have the opportunity to meet potential overseas buyers and create new avenues for media contact. In her marketing efforts, Pam also develops and distributes promotional materials in foreign languages, and develops innovative promotional opportunities.

Consumer Marketing ▼

Suzanne Elfstrom *Consumer Marketing Manager*

Each season presents new challenges and opportunities for Suzanne, who oversees Travel Montana's domestic and Canadian consumer advertising. She is involved in developing plans and budgets for spring/summer, fall and winter marketing as well as the Invite-A-Friend program and in-state winter program. Suzanne is also responsible for determining the effectiveness of Travel Montana's advertising campaigns, and makes recommendations for change based on market results. Her job includes overseeing the contracted advertising agency, presenting campaigns to the Tourism Advisory Council, and organizing cooperative advertising and marketing promotions with other states, visitors bureaus and private-sector organizations. Suzanne coordinates Travel Montana's and the tourism regions' presence at consumer travel shows in key markets, complementing consumer advertising. She also works to promote Travel Montana's numerous electronic projects.

Film Office ▼

Lonie Stimac *Film Office Manager*

Promoting Montana as an ideal place to make a movie or shoot a commercial is the job of the Film Office under Lonie's direction. She manages the office budget, personnel matters, and is responsible for location scouting with film companies making it as convenient as possible for them to shoot in the state. She assures that the Film Office staff is available to assist or make local contacts once filming begins, and also works with Montana businesses and individuals to foster a productive working relationship with film crews. Lonie acts as Travel Montana's liaison with other state and federal agencies regarding the needs of production companies. As a marketer, she attends trade shows and film festivals, and oversees advertising targeted to the film industry.

Bill Kuney *Film Location Coordinator*

Responding to the needs of film production companies interested in Montana, Bill scouts the state, shoots hundreds of location photos and compiles location information. He works to offer several options to fit the storyboards or scripts of people seeking locations for feature films, documentaries, commercials and print ads. Bill assembles customized photo presentations using the Film Office's extensive file of location photos—a file he continually restocks with new photos. His work includes traveling with film location managers or directors scouting the state, contacting local people for assistance and facilitating during filming.

Sten Iverson *Film Location Coordinator*

In addition to his location scouting duties, Sten organizes the library of thousands of photographs and videotapes and reams of other information. He also responds to requests from out-of-state companies interested in filming in Montana and prepares photo presentations to market Montana to meet their needs. He provides information to production companies on state laws and regulations relating to the motion picture industry in Montana. Sten also provides site location assistance, guidance, and counsel to the many production companies inquiring about Montana.

Film Office ▼

Maribeth Goodrich *Administrative Assistant*

Providing direct support to the Film Office Manager plus working to enhance the resources available to production companies filming in the state, Maribeth performs a broad range of administrative assistance and related duties. She assists with coordination of the Film Office's many activities and projects to ensure the smooth flow of information. During the manager's absence, Maribeth responds to contacts and correspondence from the production industry, members of the public, tourism industry, and other government agencies. Additionally, Maribeth acts as a liaison between Montana film crew members and the Film Office regarding movie projects in the state. She maintains crew and support service member files and organizes press clippings, statistics, and other information for the Film Office files. Maribeth also compiles all of the information for the *Montana Film Production Guide*.

Indian Tourism ▼

Shari Nault-Pullar *Indian Tourism Specialist*

The goal of the Indian Tourism Specialist is to establish and maintain a dynamic program that assists in the tourism development need of the seven Indian reservations of Montana. The Indian tourism office has been relocated to the Tribal Leaders Council Complex in Billings. This location fosters better communication between the tribes and Travel Montana. Shari works closely with the individuals and tribal governments facilitating appropriate tourism planning, development and promotion of reservation based plans. She also acts as liaison between public and private agencies, foundations and other industry and community stakeholders. Sustainable, eco-sensitive development providing maximum economic benefits compatible with tribal culture and life-ways demands a holistic framework. The tribes, assisted by Shari, will be designing processes that serve to inventory resources, create training programs and implement management plans which enhance employment opportunities for members while serving the traveling public. Montana is one of two states in the nation that has a staff member and program dedicated to Indian tourism development.

Customer/Visitor Services ▼

Gail Brockbank *Industry Services Manager*

Working with Montanans to expand and enhance customer and industry services provides variety for Gail every day. A primary responsibility includes management of the contracted call center which responds to nearly 400,000 phone and mail requests annually. She provides technical support and training to ensure that an extensive database is accurate, used to full capabilities and that all travel counseling is persuasive, helpful and provided in a manner that reflects the warm, western hospitality that is a hallmark of a Montana vacation. She also provides support to six state-assisted visitor information centers with these same goals in mind. Additionally, her responsibilities include the development and coordination of the annual Governor's Conference on Tourism & Recreation, staff support for the Governor's Tourism Advisory Council and overseeing the broad goals of the regional/cvb programs.

Anna Marie Moe *Industry Programs Specialist*

The main thrust of Anna Marie's duties are overseeing the region/CVB program as well as the Tourism Infrastructure Investment Program (TIIP). She oversees the distribution of over \$2 million in accommodations tax revenues to Montana's 15 tourism regions and cities. This includes assisting the organizations in applying for project funding, performing financial audits, assuring program compliance and explaining program administration to the private sector. In addition, she serves as liaison between the certified tourism organizations and the Montana Tourism Advisory Council. She also performs these same functions for the Tourism Infrastructure Investment Program (TIIP). In FY 97, the TIIP awarded \$350,000 in grants to build and refurbish tourism sites in Montana. Anna Marie also maintains accommodations tax revenue reports and oversees the production of the Travel Montana Marketing Plan.

Operations ▼

David Broussard *Operations Manager*

To ensure the most effective control of Travel Montana funds, David performs a wide range of budgeting, accounting and purchasing duties. David oversees the processing and documentation of all expenditures, purchase orders and income to assure accuracy and compliance with state rules and Travel Montana policies. He prepares cost estimates and performs financial evaluations with an eye toward reducing cost and increasing effectiveness. A key part of David's job is managing Travel Montana's extensive fulfillment activities. Each year he assures that hundreds of thousands of consumer requests are handled well, and that literature packets are mailed in a timely manner. He oversees the seasonal distribution of publications to in-state properties through contacted services. He also supervises the mailroom, as well as two administrative assistant positions.

Operations ▼

Diana Howard *Administrative Assistant*

Each season presents new opportunities for Diana. During the summer season, Diana collects and compiles visitor counts from the state's main attractions. In winter and spring, she collects daily ski conditions from Montana's ski areas producing a "Montana ski report" for dissemination in-state and across the nation. She compiles data required for seasonal bulk distribution of travel publications. Diana maintains mailing list changes, coordinates scheduling of the exhibit booths with the private sector, along with providing direct administrative assistance to various program managers. She provides back-up in serving as the initial contact for potential visitors. With direction of the Information Services Manager, Diana assists with special projects pertaining to the World Wide Web.

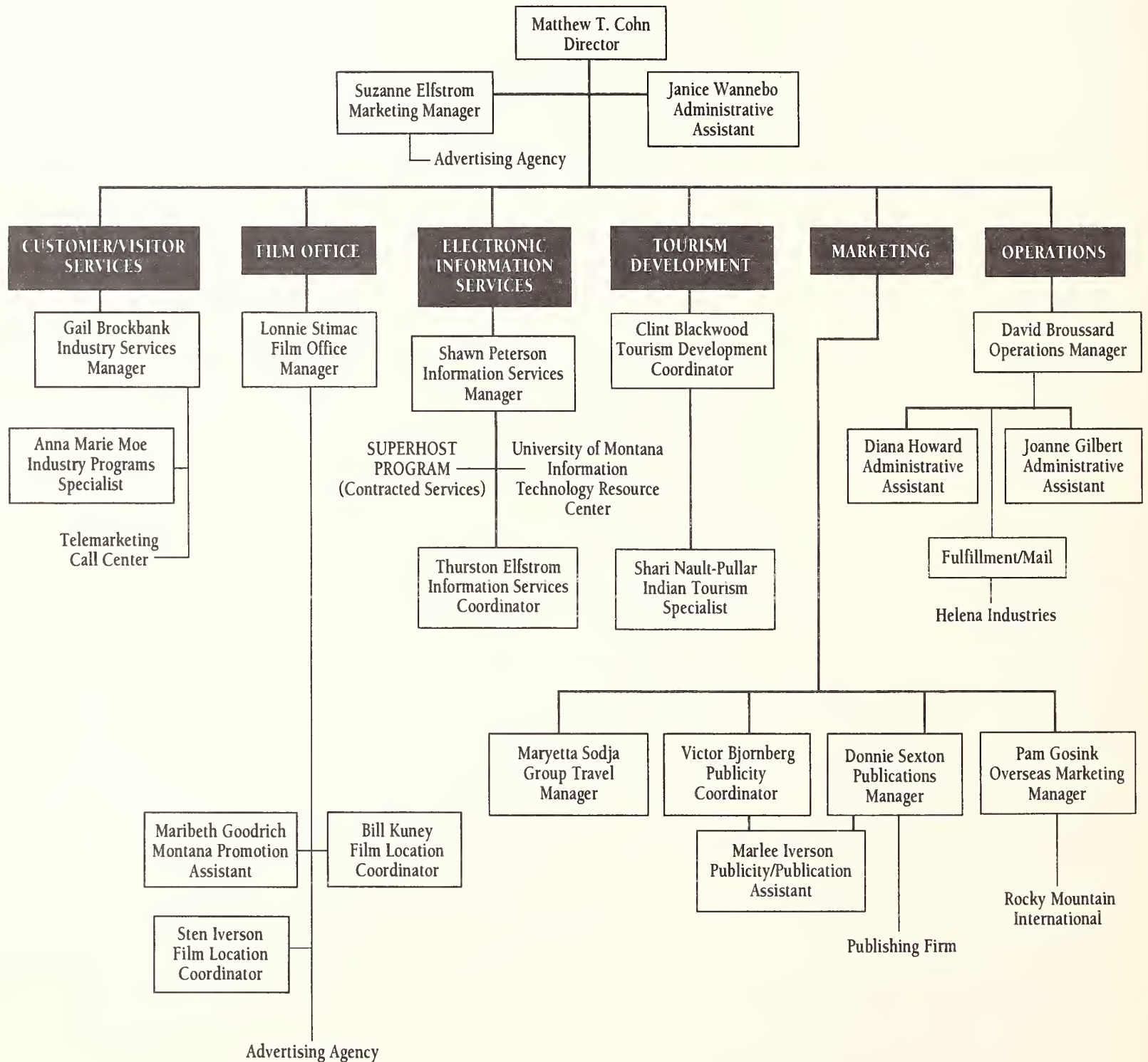
Joanne Gilbert *Administrative Assistant*

With her personal knowledge and informational resources, Joanne provides back-up as the initial contact for potential visitors in creating a favorable first impression of the state. She assists with answering questions pertaining to the World Wide Web listing, updates database for the production of survey and mails survey information to tourism-related businesses. Joanne assists the Tourism Development Coordinator with the Farm & Ranch Recreation Workshops by recording meeting minutes for the Agency Planning Committee, sending out various correspondence, workshop materials, and tallying surveys. Periodically, she collects Montana data for a pricing study in conjunction with Canada and other neighboring states, and provides direct administrative assistance to the program managers.

Fulfillment Coordinator

The coordinator oversees Travel Montana's fulfillment activities, assuring that 450,000 Travel Planners and Vacation Guides, and more than a million copies of the state Highway Map reach consumers in an accurate and timely manner. He/she is also responsible for seeing that chambers of commerce and in-state businesses receive Montana travel publications. He/she supervises packing of all types of mailings, coordinates labels and sees that all packages are metered correctly. The person also receives and processes all incoming and outgoing division mail and maintains the travel literature inventory, verifying quantity and condition as shipments arrive from the printer.

TRAVEL MONTANA ORGANIZATIONAL CHART



CONSUMER MARKETING

Travel Montana's consumer marketing program is designed to position Montana's vacation opportunities in the minds of consumers, motivating them to consider Montana as a prime tourist destination. Paid advertising, including joint ventures with private-sector tourism industry partners and with other appropriate state and provincial travel offices is the major marketing tool used to reach this goal.

All advertising is targeted towards consumers whom market research and experience have shown to be most likely to visit Montana; people who either live within a certain geographic area and fit a certain demographic profile, or have special interests that draw them to Montana, or both. Consumers who have responded to past advertising campaigns are also identified and targeted. Database marketing methods are used to capitalize on previous consumer inquiries through direct marketing campaigns.

The 1-800-VISIT-MT telephone number and the Internet address, <http://travel.mt.gov> are being used in all advertising campaigns to reinforce consumer awareness of Montana and to facilitate requests for further information.

Fall Marketing—1996 ▼

The primary objective of this “shoulder-season” marketing effort is to extend the Montana tourism season by establishing an image of Montana as a prime fall destination. Two main target audiences are:

- Primarily retired adults, empty nesters and other adult travelers who take extended fall vacations,
- The family vacationers who tend to take more vacations of shorter duration.

TELEVISION ADVERTISING

Travel Montana is in its second year of using the fall creative that debuted in 1995/96. The campaign airs in the nearby markets of Fargo/Moorhead, Minot/Bismarck, Boise, Yakima/Tri-Cities, Spokane, Calgary/Lethbridge, and Regina starting in mid-August.

PRINT ADVERTISING

The half-page, four-color fall ad has been slightly revamped since its debut in 1995/1996. The visual picture has been enlarged based on market research suggesting a more arresting visual. Placement of this ad includes *Mature Outlook*, *Travel America*, and *National Geographic Traveler* magazines. One-third page ads run in *Home & Away* and *Travel Holiday*, and a one-sixth page, black and white ad offering a Montana Vacation Guide runs in *Sunset* and *American Heritage* magazines. These ads run in the June/July time frame.

An extension to the fall campaign this year is newspaper placement to explore the feasibility of reaching those travelers in nearby markets who take “weekend getaways” with little advance planning. A black and white ad will run in Spokane's *Spokesman Review* in late-August through September to compliment our television advertising in this market.

Winter Marketing—1996/97 ▼

The primary goal of Travel Montana's winter advertising program is to position Montana on its recognized strengths: great snow, uncrowded conditions, breathtaking scenery, affordable prices and an unforgettable vacation experience.

Primary target audiences are nonresident male and female alpine skiers, nordic skiers and snowmobilers, age 35-55 in middle to upper income households. Adults age 25-45 are our secondary target.

DOWNHILL SKI CO-OP

This multifaceted marketing program is a joint venture between Travel Montana and Montana ski areas.

Elements of the campaign include magazine advertising, regional spot and cable television and ski reports. The in-state winter program and the Montana Road Show (in which participating ski areas host promotional/educational seminars in key target markets) are also important elements of this cooperative effort.

The television creative designed for the 1995/96 season continues to be used to reinforce the theme "Simply Better Skiing." Again this year Travel Montana invited individual ski areas to participate in the downhill ski television campaign. This provides each area the opportunity to customize Travel Montana's generic commercial with a tag promoting its own ski vacation packages. Each area is asked to select television markets which meet its individual priorities and, from that input, an affordable media schedule is drawn up. Traditionally, ads run in October/November and January/February in markets such as Idaho, Washington, North Dakota, South Dakota, Minnesota, Wyoming, Regina/Moosejaw, and Lethbridge. Those consumers requesting information from Travel Montana also have the option of indicating their interest in receiving further information from ski areas and lodging facilities. Travel Montana allows our ski industry partners controlled access to these inquirer lists.

The print ad creative has also remained the same with a slight modification to the photograph. It has been enlarged based on the results of focus group research. To optimize the marketing effort, advertising dollars target national ski publications such as *Ski*, *Skiing*, *Snow Country*, *Powder* and *Outside*, with full-page and half-page four-color ads. One-sixth page ads will run in *Northwest Airlines' World Traveler*. Some new publications being tested this year include *Ski World*, (a Warren Miller publication), *Inc. Travel Planner*, *Horizon*, and *Delta Sky*. This campaign is targeted

to reach skiers in both nearby markets that have historically brought the largest percentage of business to Montana, and the larger, broader national market.

SNOWBOARD ADVERTISING

This is the first year Travel Montana created a snowboard advertisement to be placed in *Snowboard Life* magazine. The ad carries the visual theme of the current ads with emphasis placed on "Simply Better Snowboarding."

CROSS-COUNTRY SKI ADVERTISING

This campaign is designed to further enhance the image of Montana as a prime cross-country ski vacation destination, targeting those enthusiasts (male and female, age 25-55, in middle to upper income households) who travel in pursuit of the sport. Primary markets are nearby states as well as "feeder markets" such as Minneapolis, Seattle and California. A one-third page, four-color ad which has a look and feel consistent with the downhill ski magazine advertising will run in October and November issues of *Cross Country Skier*, *Summit*, *Sunset* and *Backpacker* magazines.

SNOWMOBILE ADVERTISING

A new approach is being pursued this year to attract snowmobilers to Montana. A four-color, half page, double truck advertisement will be placed in *Snowmobile*, *Snow West*, and *Western Guide to Snowmobiling*. The ad carries the visual theme of the current winter campaign. Individuals responding to this ad will receive the *Montana Winter Guide* with a snowmobiling image on the cover.

IN-STATE WINTER CAMPAIGN

A new in-state campaign is being initiated this year to replace the winter Invite-A-Friend. This campaign will focus on promoting skiing to Montana residents. An incentive program is being designed with a retail driven promotion. Individuals responding to this program will receive a specially designed piece featuring all the ski areas in Montana. Creative for this campaign will follow the current theme of "Simply Better Skiing."

Spring & Summer Marketing ▼

MAJOR MARKET TV ADVERTISING

This campaign will continue to build on the strength of the “Take the Journey” theme introduced last year. The three 30-second spots target the following core markets: Seattle, Minneapolis, Denver, and Salt Lake City. New markets will be evaluated and a determination made if these are desirable markets in which to establish and maintain awareness of Montana as a vacation destination.

The campaign, which airs during March/April, runs five to seven weeks and delivers 700 to 1500 Household Rating Points, depending on the market. A combination of local broadcast and cable spot advertising is used to provide efficient targeting of market segments.

MAGAZINE ADVERTISING

Designed to complement the “Take the Journey” theme introduced in last year’s television campaign, our series of three half-page, four-color, and one-sixth page, black and white ads will run in February/March/April issues of magazines which deliver readers who match those groups targeted by Travel Montana.

The state travel offices of Montana and Wyoming will continue to increase exposure and optimize advertising budgets through Montana/Wyoming cooperative campaign featuring Glacier, Yellowstone, and Grand Teton National Parks. These are full-page, four-color ads in March-August issues of magazines which target travelers likely to visit Montana and/or Wyoming.

Travel Montana is also entering into a partnership with Alberta Community Development to promote a “two nation vacation” entitled “Passport to Heritage.” The passport program will feature historical sites throughout twelve regions. The fulfillment piece for this program will consist of a high-quality guide book containing tour maps, regional information and detailed accounts of the featured sites. This is an incentive program that will have a retail-driven promotion. The program will be launched in May 1997 and run through September 1998. Advertising mediums are still to be decided upon.

Invite-A-Friend to Montana ▼

The purpose of this program is to encourage Montanans to invite their friends and relatives to vacation in Montana, while reminding residents of the many vacation opportunities available in the state. The campaign is promoted in-state on a public service basis through the use of television, radio, newspapers, corporate mailings, and strategically placed racks and reply coupons. Both invitees and inviters receive a letter from the governor and a Montana Vacation Planning Kit.

Evaluation Mechanisms ▼

An ITRR study for 1996 focusing on “Nonresident/ Resident Summer Travel Study” will be used to evaluate the effectiveness of Travel Montana’s advertising and promotion of the six tourism regions. Also, a study on “Resident Attitude and ‘Quality of Life’” will better allow Travel Montana to determine how tourism has affected the Montana resident and what steps should be taken based on the analysis.

Consumer Exhibiting ▼

Because of proposals for funding tourism infrastructure and numerous electronic projects, Travel Montana has been obliged to reassess its participation in consumer travel shows. This will be the last year that Travel Montana will be purchasing booth space for consumer travel shows.

Under guidelines that went into effect in 1995, Travel Montana will negotiate the purchase of exhibit space at one or two consumer travel shows in established or developing markets if there is sufficient support and staffing commitment on the part regions. Travel Montana may also facilitate the participation of Fish, Wildlife & Parks staff if that significantly heightens Montana’s visibility and effectiveness of these shows.

In 1996 Montana was represented at consumer travel shows in Minneapolis and Phoenix.

CONSUMER SERVICES

Consumer services performed by Travel Montana have a multi-fold purpose:

- 1) to provide consumers with much-needed travel planning assistance,
- 2) to produce and maintain accurate statistical data for the evaluation of the division's advertising efforts, and
- 3) to obtain demographic/psychographic information on inquiries which enhance the divisions marketing programs.

Travel Counseling & Inquiry Processing ▼

Once awareness of Montana as a vacation destination has been created or the consumer has made the decision to travel in Montana, it is important to provide accurate and timely vacation planning information.

Travel Montana contracts with a private sector call center in Missoula to answer nearly 400,000 phone and mail requests for travel information. Travel counselors have access to an extensive database of travel opportunities in Montana, including all types of lodging, campgrounds, outfitters/guide services, events, recreation opportunities and traveler services.

Travel counselors receive extensive training in customer service skills, persuasive travel counseling skills and knowledge and familiarity of Montana in order that they can effectively meet the needs and expectations of inquirers. Travel counseling skills also increases the conversion of potential visitors to scheduled visitors and extends the stay of scheduled visitors.

Through the database and software counselors can provide specialized information by e-mail and fax or general information by regular mail. The software is also designed to eliminate duplicate entries and collect statistical data on the interests of the caller.

Travel Montana sets the program guidelines and procedures, provides training and monitors all aspects of the operation.

Fulfillment ▼

Requests for travel information are currently being fulfilled by three methods: fax, e-mail, and postal service. Callers select the best method for their needs. In addition, although some callers request only verbal information, they do provide their name for statistical purposes.

Once mail requests are entered by operators, labels or Invite-A-Friend letters are produced and mailed within two working days. Standard packets are sorted for bulk mailing, packaged and mailed by students of a training program for the developmentally disabled. Requests that require extra material or special handling are prepared at the Travel Montana site.

In addition to nonresident inquiry fulfillment, Travel Montana distributes major travel publications to in-state sites frequented by travelers. A spring distribution is completed under a contract awarded through a bid process and is designed to reduce the costs of bulk requests throughout the year. Weekly bulk requests are also processed and shipped by truck or UPS.

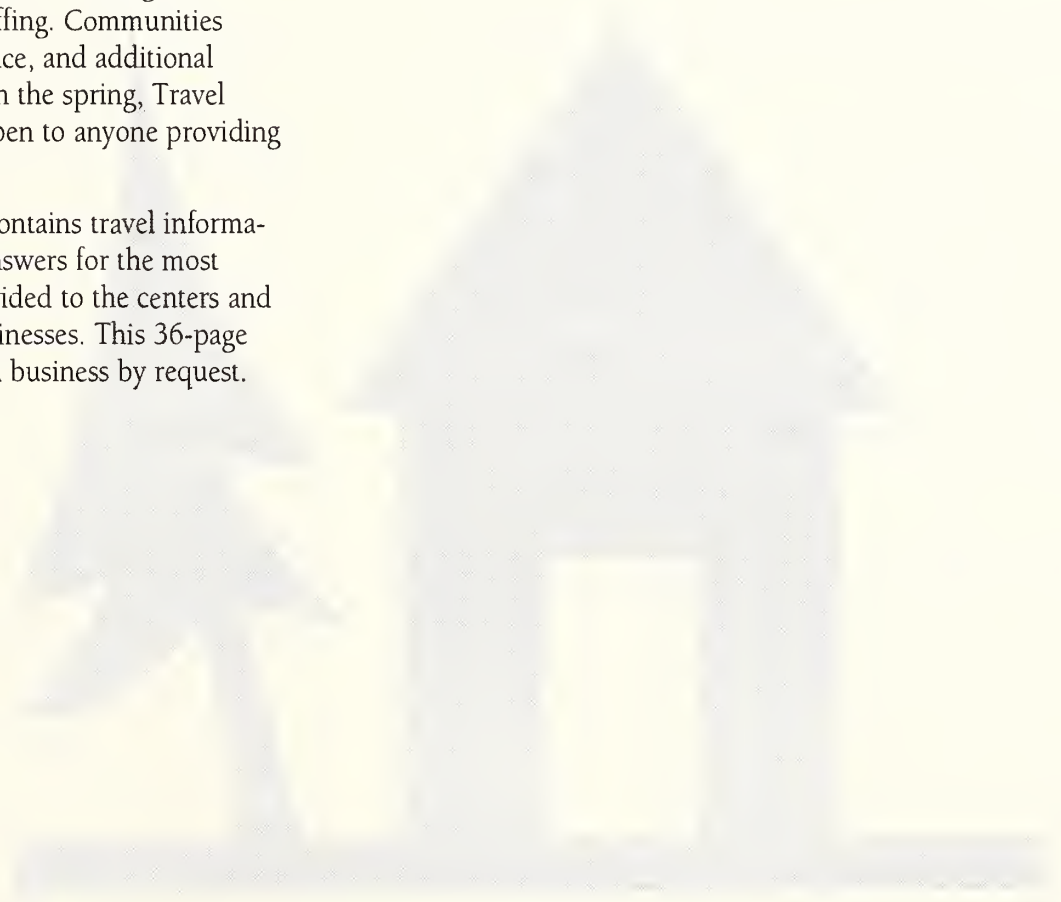
Computer and labeling equipment will be evaluated to assure greatest accuracy, speed and cost savings in processing both bulk and individual requests.

Visitor Information Centers ▼

In cooperation with communities, Travel Montana is providing visitor information centers at six sites in the state. The six operational sites are Culbertson, Dillon, Hardin, St. Regis, West Yellowstone and Wibaux with the final site, Shelby, anticipated to become operational in 1997. All sites were identified in a study presented to the 1991 Legislature.

Travel Montana has an agreement with a nonprofit organization in each community to provide an outdoor kiosk, computer and database, office furniture, Made in Montana furniture, TV/VCR, brochures, training and \$13,000 annually to assist with staffing. Communities provide the building, its maintenance, and additional staffing and volunteers if needed. In the spring, Travel Montana offers training which is open to anyone providing visitor information.

The *Quick Reference Guide*, which contains travel information, travel counseling skills and answers for the most commonly asked questions, is provided to the centers and other Montana tourism-related businesses. This 36-page booklet is available to any Montana business by request.



CONSUMER PUBLICATIONS

Publications play an important part in the vacation planning process of travelers, as often a potential visitor makes the choice between Montana or another vacation destination. Travel Montana guides are consumer driven in an effort to provide accurate, reader-friendly information in an easy-to-use format. The guides are designed to reflect the spirit of Travel Montana's advertising campaigns. In an effort to keep our travel publications innovative and creative, many of the guides produced in 1996 featured new design and photos changes which will carry through 1997.

1996-97 Montana Winter Guide ▼

This four-color comprehensive guide to Montana's winter activities features some new design and photo changes. Included within the 52 pages is specific information on downhill and Nordic resorts, details on Montana's groomed snowmobile trail systems, and groomed cross-country ski trails, winter safety tips and a directory featuring over 85 businesses offering services, such as lodging, snowmobile rentals, etc. Major airlines with service to Montana, as well as the Bureau of Land Management, US Forest Service and Department of Fish, Wildlife & Parks are partners in this effort. (Print 150,000, available August 1996.)

1997-98 Montana Vacation Guide ▼

This 48-page four-color guide showcases Montana at its best. A photo essay on the Big Sky country leads off the book and serves as an enticement piece for attracting visitors. The guide then focuses on the six regions and lists specific attractions, historical sites, state parks, activities, major annual events, etc. for the traveler. The guide also features a detailed highway map, basic facts/figures concerning Montana, general transportation information, responsible travel tips, and a directory of useful numbers for the traveler. (Print 525,000, available January 1997.)

1997-98 Montana Travel Planner ▼

This 130-plus page guide is divided into six sections, each featuring one of Montana's tourism countries. Within each country there is comprehensive information on the following: motels/hotels, bed and breakfasts, guest ranches, resorts, hostels, hot springs and public and private campgrounds. Also included with each country are details on recreational opportunities, such as golf courses, ski areas, state parks and national forests. The travel planner also features a section on general information resources such as car rentals, weather and road reports, local chamber contacts, and airline information. (Print 535,000; available January 1997.)

1996-97 Montana Highway Map ▼

The large format, four-color highway map with mileage chart sports a new look for 1996-97. The map was updated by the Montana Department of Transportation for 1996. The back side features new design, photos and highlights the major points of interest for each of Montana's six tourism regions. One panel of the map is again devoted to the Lewis and Clark Trail. (Print 1.3 million. ongoing availability.)

Montana Calendar of Events ▼

A two-fold, one-color brochure which details Montana's main tourism-oriented events and celebrations.

1996-97 Winter Calendar

(October-March)

(Print 100,000; available August 1996.)

1997 Summer Calendar

(April-September)

(Print 390,000; available February 1997.)

1995-96 Montana Fishing Guide ▼

Revised and printed in April 1995, the fishing guide continues to provide detailed maps and charts of fish species found in various Montana waters. Now in a two-color 5" x 8" format for ease of use, the guide also includes information on Montana's nine fish hatcheries, fishing etiquette, special regulations and licensing details. This guide is produced in cooperation with Montana Fish, Wildlife & Parks. (Print 250,000; currently available.)

Montana Indian Reservations Brochure ▼

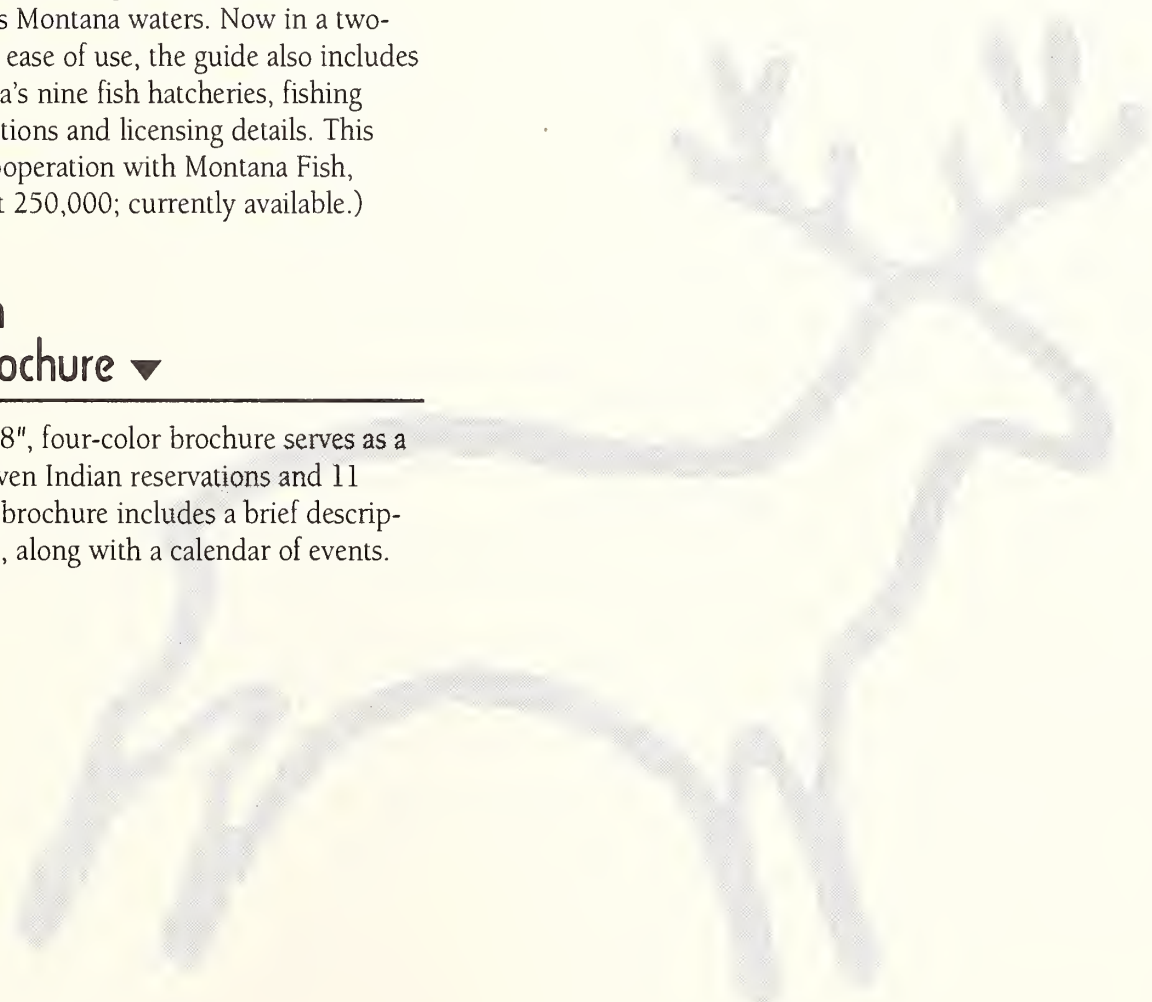
This three-fold, 12" x 18", four-color brochure serves as a visitors' guide to the seven Indian reservations and 11 tribes in Montana. The brochure includes a brief description of each reservation, along with a calendar of events. (Currently available.)

Montana Facts Sheet ▼

This two-fold, one-color 9" x 16" brochure is designed as an educational piece. This continuously updated sheet is used to provide Montana facts to libraries, schools and children. (Currently available.)

Kids Fact Pack ▼

This brochure is designed to serve as an energetic and colorful fulfillment piece to inquiries from children, schools and libraries on Montana. It will replace the Montana Fact Sheet. (Available October.)



U.S. & CANADIAN PUBLICITY

Publicity is one of the most believable and effective types of exposure a travel destination can get. Travel Montana utilizes an aggressive plan to generate editorial exposure in national magazines, television shows, and regional and local publications. Key travel and news media, both broadcast and print, will be targeted for editorial coverage of Montana in 1996/97.

Publicity Campaigns ▼

Publicity campaigns are coordinated efforts to promote a Montana event, attraction or season to the national and international media. Following the policy set forth in the Montana Tourism Industry's and Travel Montana's Five-Year Strategic plans, the publicity office will focus its efforts on highlighting Montana's many and varied travel opportunities. This will be done in coordination with the state's tourism regions and convention and visitors bureaus (CVBs). In addition, publicity efforts will be coordinated with the Consumer Advertising program to tie Travel Montana's publicity efforts into the market focus of its advertising campaigns.

Writer Familiarization Trips ▼

Writer familiarization ("fam") trips are hosted trips to the state of Montana for qualified writers or broadcast media who are on assignment to gather story information. Travel Montana encourages the regional tourism organizations to participate in writer "fam" projects. Travel Montana selects appropriate publications and broadcast outlets, makes the contacts and provides assistance in developing itineraries. The "fam" is then hosted by the regional organization.

Publicity Assistance ▼

Once interest is generated among writers and editors, Travel Montana works with the state's travel and tourism industry to offer assistance with airfares, lodging, guides, meals and the transportation needed for the media to complete their Montana travel story development and production. Travel Montana also serves as an information resource for travel writers and others reporting on Montana. It offers the media access to color slides, produced videos and stock video footage. These types of publicity assistance were provided to over 100 publications and broadcast outlets in 1995, resulting in over \$2.5 million worth of publicity for Montana.

Video Production & Distribution ▼

Travel Montana offers consumers and the media four video productions and a video footage library highlighting Montana's statewide travel opportunities. The productions include a half-hour program called "Montana: America's Natural Park," two 15-minute versions of this program—one focusing on the summer season and the other the winter—and a 9 ½ minute video entitled "Nature's Song." Each video is provided at cost to consumers upon request or free to media interested in airing the programs in full or using portions to produce programs on travel in Montana. The publicity office will work with its media partners to expand the images in the video footage library and make it more useful to Montana's travel promoters.

Cooperative Media Promotions ▼

The publicity program is constantly searching for and pursuing media opportunities to be conducted through cooperative efforts between Travel Montana, the state's tourism regions, CVBs, communities and travel related services.

In the summer and fall 1996, the publicity program will assist Montana's downhill ski areas get 1997 ski season information out to the regional and national media. This effort will include summer and early fall mailings highlighting what's new at the ski areas as well as the basic information about their facility and services. In the fall, Travel Montana will attend one of the regional North American Association of Ski Journalists trade fairs to network with ski journalists and promote coverage of Montana's ski areas.

In addition to its support and coordination of the group media tours to the regions, the publicity program will pursue cooperative projects involving the electronic media and print publicity for a variety of Montana travel opportunities across the state.

Quarterly Newsletter ▼

Untold Story Leads from Montana is mailed quarterly to approximately 650 editors, travel writers and broadcast producers in the U.S. and Canada. The newsletter offers brief, factual story ideas and provides a quarterly reminder to the media that Montana has a wide range of subjects to cover.

Calendar of Events ▼

Media calendars of events listing dates, contact people and a short description of each event are distributed to writers, editors and producers in seasonal press kits and on an as-needed basis. These calendars differ from the ones produced for distribution to consumers because of the special needs of the media, such as longer lead time and greater descriptive detail.

Keeping in Touch ▼

Regular mailings provide continued contact with important media, allowing them to update their background information files, spark new story ideas and keep Travel Montana's media lists current. These mailings will include two press kits consisting of Montana Vacation, Travel Planner and Winter guides along with the six-month *Calendar of Events* and the seasonal *Untold Story Leads from Montana*. Two other mailings will include the seasonal *Untold Story Leads from Montana* and appropriate communications or press trip invitations. Additional information will be provided as needed.

Montana Travel Update ▼

This monthly newsletter is designed to keep Travel Montana's partners and supporters informed of issues, activities, events and developments important to Montana's tourism industry. *Montana Travel Update* offers a quick briefing on tourism issues, outlooks, research, success stories, challenges and upcoming Travel Montana events and activities.

Evaluation Mechanisms ▼

Each year, research is done to estimate the dollar value of publicity generated as a result of these programs. Each publicity item is "valued" as the cost for a similar amount of advertising space in the same medium. In calculating comparable publicity amounts, Travel Montana focuses only on publicity it has had a role in developing.

OVERSEAS MARKETING

Travel Montana aggressively promotes Montana as a destination to the international travel trade, with emphasis on the United Kingdom, Germany, France, Belgium, the Netherlands, Japan and Taiwan. The program involves working with key tour operators, wholesalers, travel agencies and the media to establish new Montana itineraries for groups and FITs (individuals), while assisting Montana businesses in their marketing efforts overseas.

This is accomplished by representation at key international travel trade shows, familiarization tours, cooperative advertising ventures with other states in the region, brochure and video distribution and ongoing personal contact with targeted tour operators, wholesalers, travel agents and media.

Western Europe ▼

The European marketing program includes use of the services of specialized travel representatives, on a contractual basis, in cooperation with the states of Wyoming, South Dakota and Idaho. Primary markets are the United Kingdom, Germany, France and the Benelux countries (Belgium, the Netherlands, and Luxembourg).

Under the Rocky Mountain International (RMI) banner of "The Real America," Montana continues to see tremendous success from collective marketing efforts. The four states will participate jointly in World Travel Market (London), International Tourism Exchange (Berlin), and Swiss Visit USA (Switzerland).

Familiarization ("fam") tours for trade and media representatives, as well as trade missions, are also important components of the Rocky Mountain International program.

Pacific Rim ▼

Trade office representatives in Kumamoto, Japan and Taipei, Taiwan market Montana's travel-related products and services to the travel trade in their respective countries under close direction from Travel Montana. Their responsibilities include contact with wholesalers, tour operators, travel agents and media to create demand for Montana's travel-related products and services. This objective is achieved through distribution of travel materials, organization of familiarization trips, translation of Montana literature, travel trade show participation and sales calls.

Travel Montana has a Japan marketing program through RMI. Working together as a region, activities include the

development of new destination products in Montana, Wyoming, and South Dakota, a "Back to Nature" tour series, and promotional missions/seminars in California, New York and Japan. Familiarization tours will also be an important part of the program.

European Sales & Training Seminars ▼

The RMI states of Montana, South Dakota, Wyoming and Idaho will conduct trade and travel agent training seminars in France, Belgium and the Netherlands in 1996/97. Each state representative and the RMI European directors will present seminars in Paris, in November 1996, prior to WTM Trade Show and in Brussels and Amsterdam in March 1997, prior to ITB Trade Show. The Rocky Mountain Round-Up will be repeated in October 1996, bringing 30 tour operators/journalists to the region for 10 days. Two business sessions will be held, giving Montana suppliers the opportunity to meet on an appointment basis with the Round-up participants.

Trade Shows ▼

Visibility at the key international travel trade shows allows Montana to make contact with wholesalers, operators, and media provides the opportunity to follow-up on new and existing projects and ideas. Travel Montana delegates are sometimes joined by private-sector participants. In addition to those that are previously noted, Travel Montana will also attend Discover America International Pow Wow (June 1996, Nashville).

Overseas Marketing Workshop ▼

To assist Montana businesses interested in becoming involved in overseas marketing or increasing their share of overseas visitors, an in-depth seminar will be presented in conjunction with the annual RMI meeting, to be held in Montana in the spring of 1997 (dates and location to be announced). The main emphasis will be on how to most effectively sell Montana, work with the overseas travel market and successfully host international visitors. The workshop will count on participation by experts in the field from state, regional and international levels.

Familiarization Tours ▼

With the assistance of Montana travel industry members, “fam” tours will be conducted to provide firsthand knowledge for prospective tour operators. By experiencing Montana, operators can better understand the mechanics of designing new itineraries in the state. “Fam” tours will also be held for carefully selected travel journalists, with the intended result of generating positive travel articles in foreign publications.

Other Promotional Activities ▼

Following the unprecedented success of the *City Slickers* promotion in the United Kingdom and Japan, Montana will continue to pursue development of similar opportunities. By developing promotional partnerships with the distributors of American films and videos that feature the types of vacation and recreational opportunities found in the region, consumer awareness of the state’s destination potential is increased.

River Wild promotions took place in the spring/summer of 1995, involving tour operators and journalists from Europe and Taiwan. *Legends of the Fall* promotions took place in the spring and summer of 1995 and 1996.

Promotional activities will also include the distribution of promotional publications and videos, in foreign languages when possible; and the development of other innovative promotional projects.

Direct Mail Campaign ▼

This specialized direct mail program will provide current tour planning material to tour operators, as well as follow-up to contacts initiated during trade shows. This program also establishes and maintains a professional rapport with overseas group and FIT travel planners. In addition, *Montana Magazine* is mailed throughout the year to selected international tour operators who also receive *The Montana Calendar* each year.

Evaluation Mechanisms ▼

Montana’s visibility in overseas markets is measured by tracking the number of Montana tourism itineraries which have been added or expanded by international operators/wholesalers (tour extracts provided by RMI), the interest level of consumers and trade representatives in overseas target markets and by monitoring changes in travel expenditures of overseas visits.

U.S. & CANADIAN GROUP TRAVEL

Montana's domestic group tour program is designed to promote Montana's many group tour and travel opportunities by marketing directly to group tour operators throughout the United States and Canada. Montana is promoted as a tour destination, as well as a viable stopover on tour itineraries. The program promotes all seasons in Montana and encompasses activities from sightseeing to river rafting to skiing.

Familiarization Tours ▼

Familiarization tours will be conducted to provide personal, firsthand site inspections for prospective group tour operators. By experiencing Montana, tour operators can better understand the mechanics of designing new itineraries in Montana.

Keeping In Touch ▼

This specialized direct mail program will provide current tour planning material, as well as establish and maintain a professional rapport with group travel planners throughout the United States and Canada.

CALENDAR

One-hundred-twenty selected group tour operators will receive *The Montana Calendar*. Featuring many aspects of the state, the calendar will communicate a positive image of Montana as a scenic tour destination.

MONTANA MAGAZINE

This bimonthly magazine will be sent to 120 targeted group tour operators. With new tour attractions featured in each issue, this direct mail effort is designed to inform and educate group tour operators.

Travel Trade Events ▼

By attending select travel shows and conventions, contacts can be made with prospective group tour operators and new and expanded Montana itineraries can be discussed and promoted. Selected tour operator consumer shows will also be attended by Travel Montana to enhance and support sales of existing Montana tours packaged by qualified tour operators.

NATIONAL TOUR ASSOCIATION (NTA)

Travel Montana will attend both the annual marketplace and convention in Minneapolis in November of 1996. Two Travel Montana representatives will attend the fall marketplace.

AMERICAN BUS ASSOCIATION (ABA)

One representative from Travel Montana will attend the annual marketplace and convention, scheduled for early December in Portland.

Sales Blitzes ▼

Personal sales calls will be made to selected group tour operators. This effort will assist in the development of new and expanded Montana tour programs, as well as establish and maintain Montana's presence in key markets. These sales calls will be timed, wherever possible, in conjunction with Travel Montana media advertising and/or participation at consumer and trade shows.

Group Travel Workshop ▼

This seminar/workshop is planned for members of the Montana travel industry who are interested in working with the group travel industry. The seminar will focus on effective techniques for development of group tours.

Advertising & Marketing ▼

Specific projects will be undertaken to heighten consumer awareness of Montana, as well as awareness of group tour operators in the United States and Canada. Planned projects include timely insertions in travel trade publications and cooperative advertising projects with the private sector.

COURIER MAGAZINE

A trade magazine of the National Tour Association (NTA), this publication is distributed free of charge to some 500 NTA group tour operator members and to approximately 3,000 tour supplier members. This will be a cooperatively funded project with the tourism industry of Montana.

DESTINATIONS MAGAZINE

Similar to *Courier*, *Destinations* magazine is a travel trade publication distributed to both group tour operators and tour suppliers. This project will also be a cooperatively funded effort with the tourism industry of Montana.

PROMOTIONAL POSTERS

Travel Montana will work to increase consumer awareness through distribution of promotional posters. Distribution channels will include travel agencies, group tour offices and conventions and meetings.

IMAGE BROCHURES/TOUR SHELLS

Creating and distributing image brochures will be an additional method used by Travel Montana to help tour operators increase consumer awareness of their Montana itineraries. Distribution channels will be the same as those used for the promotional posters. Distribution of tour shells will help operators sell specific Montana itineraries.

PRESS RELEASES

Travel Montana will prepare and distribute several press releases over the course of the year to keep Montana visible in travel trade publications.

GROUP TOUR PLANNING GUIDE

The *Montana Group Tour Planning Guide* is designed to be an "all-in-one" tour planning reference. With listings of attractions, events, hotels and restaurants, the guide encompasses the points of interest for the tour planner designing a Montana itinerary.

Evaluation Mechanisms ▼

The number of group tours traveling in and through Montana is tracked by permits issued by the Montana Department of Highways and by research conducted by the Institute for Tourism and Recreation Research (ITRR). Additionally, group travel promotional efforts are evaluated through personal contacts and meetings with key tour operators at national conventions.

MEETINGS & CONVENTIONS

Montana continues to grow as a key destination consideration for convention and meeting planners nationwide. To further strengthen Montana's image among these decision makers, Travel Montana is continuing to expand its convention marketing efforts.

A comprehensive program for the promotion of meetings and conventions has been designed in cooperation with the convention & visitors bureaus (CVBs), and with input from the Montana Innkeepers Association.

The goals of Travel Montana for this expanded marketing program are twofold:

- 1) Build and maintain a positive image with prospective meeting and convention planners;
- 2) Generate and distribute leads to the CVBs for them to distribute to the appropriate convention facilities in their area.

Advertising Campaign ▼

In order to further increase awareness of Montana as a desirable location for meetings, conventions and seminars, Travel Montana will undertake a magazine advertising campaign for 1996/97. This campaign will be in cooperation with the convention & visitors bureaus in the state.

TARGET AUDIENCE

This campaign will specifically target individuals who influence or make decisions about the location of meetings, seminars and/or conventions for associations, corporations and other organizations.

MEDIA STRATEGY

The selection of the media is based on those publications with high readership among the various target audiences, and/or which have a specific regional or editorial focus that relates well to Montana's position as a meeting location. In addition, publications with bonus distribution during related convention/trade shows are included.

FULFILLMENT

All inquiries from the advertisements will be fulfilled with a *Montana Meeting Planner's Guide*. Those leads will then be distributed on a regular basis to the participating convention & visitors bureaus.

Trade Shows ▼

Trade shows provide an avenue to meet one on one with the key decision makers in the industry. Travel Montana will attend four shows in FY97: Meeting Planner's International (MPI), Affordable Meetings, Meeting World and Incentive Travel and Meeting Executives (IT&ME). Whenever possible, Travel Montana will share booth space with interested CVBs.

Meeting Planner's Guide ▼

The *Montana Meeting Planner's Guide* is a complete resource for meeting planners—from cozy three-person retreats to large scale conventions. This full-color guide also includes essential information on related services, such as transportation and meeting coordinators.

Direct Mail Campaign ▼

The direct mail campaign will be a two-tiered campaign with the first mailing, a four-color image piece, produced and distributed by Travel Montana to approximately 5,000 targeted meeting planners nationwide. This piece will be a self-mailer and will include a bind-in reply card allowing recipients to request additional information.

The second mailing will be a fulfillment piece for the first mailing and will include a letter of invitation from the governor along with the *Montana Meeting Planner's Guide*. Travel Montana will then send these leads to the Convention & Visitors Bureaus on a regular basis.

Press Releases ▼

Travel Montana will prepare and distribute several press releases over the course of the year to keep Montana visible in appropriate trade publications.

Sales Calls ▼

No special sales trips are planned solely for the purpose of calling on convention and meeting planners; however, calls will be made on meeting planners as much as possible in combination with other trips already planned by Travel Montana.

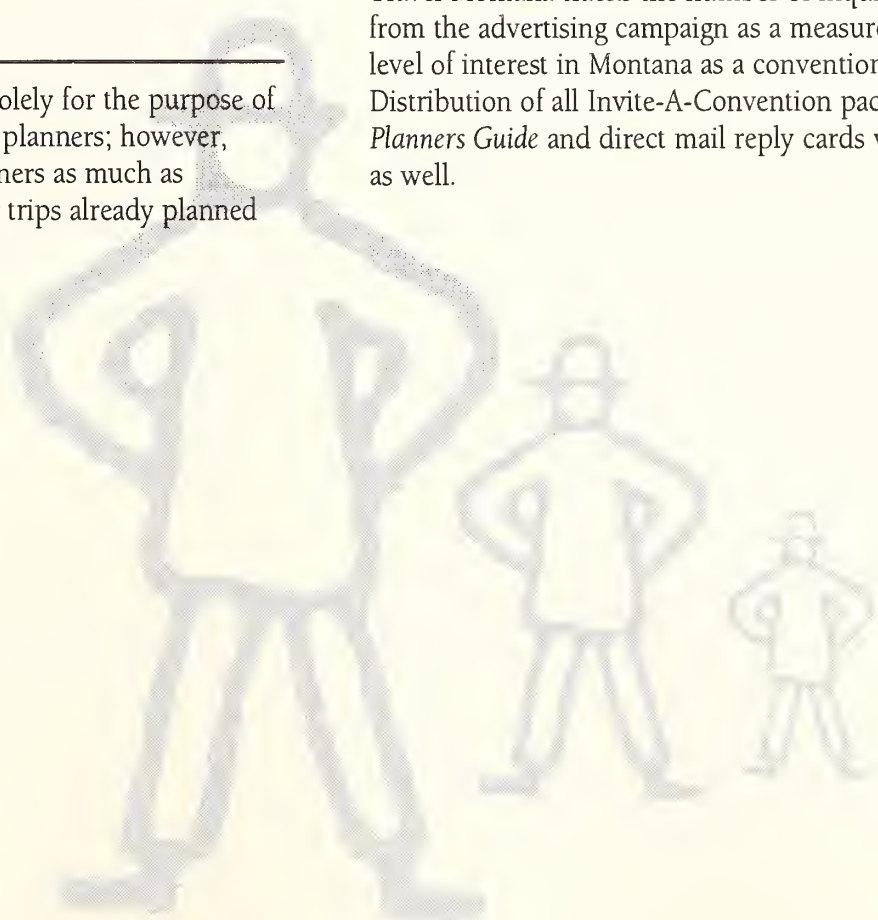
Invite-A-Convention ▼

This campaign is promoted in-state through letters from the governor to state employees, Montana corporations, agencies and associations. The letter is aimed at encouraging employees of those organizations to bid conventions when they travel or attend conferences. Additionally, the program encourages them to contact Travel Montana for a "Convention Kit," containing tips on bidding and planning a convention, as well as a *Meeting Planner's Guide* listing convention and meeting facilities statewide.

Another aspect of this campaign is a letter from the governor, along with a Vacation Planning Kit, encouraging association members to attend conventions scheduled to take place in Montana and inviting potential participants to extend their stays in Montana in conjunction with their conventions.

Evaluation Mechanisms ▼

Travel Montana tracks the number of inquiries received from the advertising campaign as a measurement of the level of interest in Montana as a convention destination. Distribution of all Invite-A-Convention packets, *Meeting Planners Guide* and direct mail reply cards will be tracked as well.



INDUSTRY SERVICES

Travel Montana's industry services are aimed at supporting nonprofit tourism organizations and private sector businesses to enhance and strengthen marketing efforts which increase business, as well as provide opportunities for the industry to unite and work together.

Disbursement of Funds to Certified Tourism Organizations ▼

The Lodging Tax Law specifies that approximately 25 percent of the accommodations tax proceeds to the Department of Commerce will be returned on a prorated basis to six tourism regions and nine qualifying cities (as shown on page 5) for their promotion as a travel destination or movie filming location.

Typical projects undertaken by these tourism organizations include brochures, travel guides, television advertising, full-color and directory print ads, publicity campaigns, convention marketing and consumer and trade show exhibiting. Travel Montana's responsibilities include:

- Review of each project proposal to ensure compliance with Tourism Advisory Council (TAC) guidelines and the law.
- Presentation of regional/convention and visitors bureau (CVB) marketing plans and projects to the Tourism Advisory Council for approval. (Assistance in development is available for tourism organizations from Travel Montana if desired.)
- Annual program and financial audits of tourism organizations.
- Refinements of compliance procedures to provide a more streamlined process, yet still meet all legal and guideline requirements.
- Facilitating the execution of projects between Travel Montana and the regions and CVBs by developing two brainstorming/educational sessions per year.

Governor's Conference on Tourism & Recreation ▼

The focus and purpose of the annual Governor's Conference on Tourism and Recreation is to build consensus for the direction of the industry in Montana, heighten industry awareness; provide marketing tips, research results and hands-on workshops; present national and state travel trends; as well as to provide a format for networking.

The conference is a two-day event, providing a variety of in-state and national speakers, on topics determined by input from previous year attendees, current events and suggestions by other recreation, research and cultural partners. The conference also includes a trade show. Registration, pre-planning and on-site assistance is provided through a contract with a professional meeting planner.

The 1997 conference will be held in Helena on March 20 and 21.

SUPERHOST PROGRAM

In the long term, Travel Montana's success will be judged not only by the number of guests who visit the state, but also by the quality of their stays and the number of times they return. Montana has an outstanding reputation for friendly people, and is fortunate to have a comprehensive customer service training/visitor information program in place.

Superhost Program ▼

The Superhost program is designed to create an awareness and understanding of Montana's travel industry and to enhance the level of customer service provided by the industry. Ultimately, the program strives to encourage the state's visitors to stay longer, tell their friends about positive experiences, and to return to the state time after time. The Superhost program stands ready to lead the way in educating Montana communities and businesses about the importance and economic impact of Montana's tourism industry.

Superhost workshops are three to four hours in length, and cover a wide selection of travel and customer service topics. They are designed to develop a commitment to quality service and to broaden each participant's knowledge of Montana's tourism industry. All Superhost workshops contain a common core of information, but were developed to be flexible in order to meet the needs of individual businesses and communities. The workshops are designed to involve participants in an interactive learning experience as opposed to a lecture type atmosphere. As a result, each workshop is slightly different depending on the facilitator's style, the background and experiences of participants and the needs of the business/organization.

CONTRACTED TRAINERS

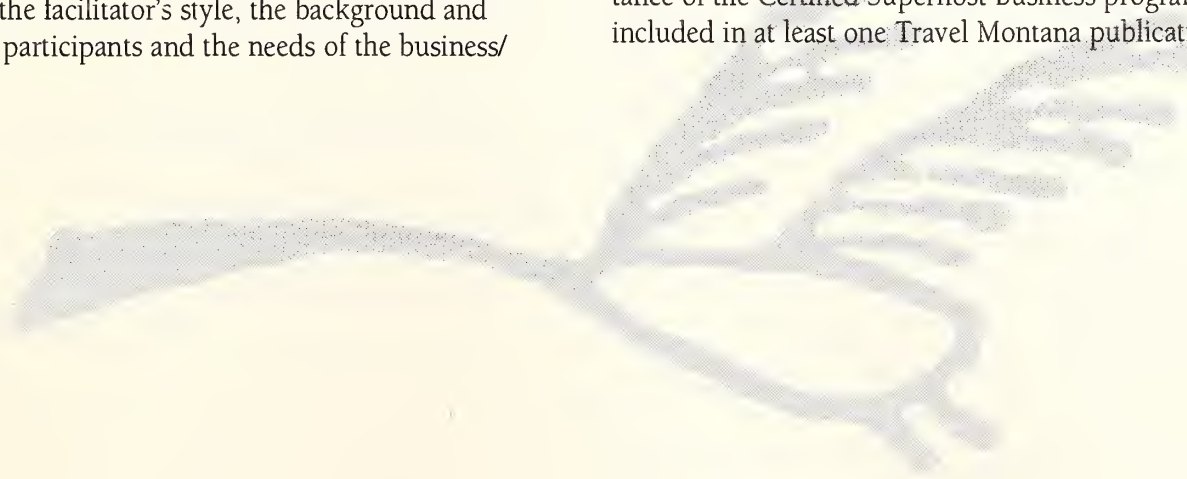
Travel Montana contracts with professional trainers who conduct customer service workshops throughout Montana. These trainers help to make cost-effective customer service training readily available in every community in Montana, regardless of size. The trainers are responsible for marketing the program to communities and businesses within their designated regions.

SUPERHOST COMMUNITIES

In order to become a Superhost community, local groups or organizations must develop and initiate a plan to provide ongoing customer service training, provide staffing for a local visitor center and develop tourism materials that list events, attractions and visitor services available in the area.

SUPERHOST BUSINESSES

In order to become a "Superhost business" a majority of a business' current staff needs to have participated in a Superhost workshop within the previous 24 months. Certified Superhost businesses receive a Superhost window/door sign. Information highlighting the importance of the Certified Superhost Business program is included in at least one Travel Montana publication.



Montana Travel Information System ▼

In order to improve the level of tourism and recreation information available to visitors and Montana residents, the Montana Tourism and Recreation Initiative (MTRI) has developed an interactive information system. Travel Montana will continue to coordinate this effort with the belief that providing guests with more information about Montana's tourism and recreation opportunities will encourage them to stay longer and, thus, provide a greater economic impact to Montana.

The Montana Travel Information System (MTIS) is a state-of-the-art interactive travel information system accessible to visitors traveling in and through Montana. The system features multimedia computers with touch screens, and incorporates text, pictures, video and sound. Participating MTRI state and federal agencies include travel and recreation information in the system that is of interest to the traveler in Montana. These interactive computers are located in high traffic areas throughout the state. Chambers of commerce and other Montana tourism-related businesses will also have the opportunity to purchase the information systems.

Montana on the Internet ▼

It is estimated that over thirty million people currently have computer access to the Internet, the world's information superhighway. Based on the tourism and recreation information collected for the MTIS project, Travel Montana has established a World Wide Web (WWW) computer site on the Internet. The WWW is a fairly new development and allows people throughout the world to view pictures, read text, and watch video segments about Montana from the comfort of their own homes and offices. The Internet project is designed to complement Montana's traditional tourism marketing efforts and promises to change the way Travel Montana responds to inquiries and requests for information.

During the first five months of 1996 over 25,000 people visited the Travel Montana WWW site.



TOURISM DEVELOPMENT & EDUCATION

As Montana continues to develop and market its tourism and recreation potential, coordination of efforts within the Montana tourism industry becomes increasingly important. The main emphasis of this area is to coordinate and facilitate cooperative tourism-related efforts between federal and state agencies and private-sector interests. This will be achieved in accordance with the Montana Tourism Industry's Five-Year Strategic Plan and Travel Montana's corresponding Five-Year Marketing Plan.

Following the direction highlighted in the Five-Year Strategic Plan, Travel Montana will enhance its community outreach efforts. The two main areas of focus will be rural tourism assessment and development and tourism-related education. Both of these programs will be closely coordinated with various other state and federal agencies and the Montana State University Extension Program.

Interagency Coordination ▼

Extensive cooperative partnerships will be further cultivated among appropriate state and federal agencies through the recently formed Montana Tourism & Recreation Initiative (MTRI). Participating state agencies include the Departments of Commerce; Transportation; Fish, Wildlife & Parks; Natural Resources & Conservation; Montana Historical Society and the University Extension Service. Federal participants include the National Park Service, Bureau of Land Management, Army Corps of Engineers, Fish & Wildlife Service and the USDA Forest Service. Travel Montana will schedule and facilitate meetings. Specific project coordination will be shared among MTRI members:

- Establishment of interactive travel information computer kiosks.
- Coordination of printed promotional literature.
- Development of interagency planning and research processes.
- Creation of public-sector development and promotion strategy for upcoming Lewis and Clark Bicentenary

Additionally, Travel Montana will work closely with state and federal agencies and private-sector interests on such issues as the development of programs to enhance Scenic Byways and Watchable Wildlife.

Indian Tourism Development & Promotion ▼

Travel Montana will continue to work closely with Montana's American Indians on issues of tourism planning, marketing and promotion through the Indian Tourism Specialist position and the Indian Tourism Working Group. Travel Montana, in partnership with the Montana Coordinator of Indian Affairs Office, will expand efforts in working with each Montana Indian tribe at their individual levels of interest and development while striving to network tourism opportunities statewide among tribes as appropriate. A focused coordination program with tribal colleges on Montana Indian Reservations will facilitate the expansion of needed tourism and recreation education for Montana's Native Americans.

Strategic Tourism Plan & Marketing Plan Review & Update ▼

A review and update process initiated in FY96 will be completed on both the Five-Year Strategic Tourism Plan and Five-Year Marketing Plan in FY97. Specifically, both plans will be reviewed and updated to summarize the actions that need to be implemented to ensure the achievement of key goals and objectives identified as being within Travel Montana's overall mandate. This process will involve a broad spectrum of diverse interests in both the public and private sector of Montana's travel and tourism industry. The projected timeline for completing these plan updates is Jan./Feb. 1997.

Funding Procurement ▼

Travel Montana will continue to explore opportunities available to secure “non-traditional” funding sources to compliment the existing accommodations tax revenues. Funding alternatives such as federal grants, corporate grants, and sponsorships and private foundations will be researched and appropriate applications submitted.

Rural Tourism Assessment & Development ▼

To assist the many rural communities of Montana considering tourism as an economic stimulus, Travel Montana will continue to coordinate and facilitate the implementation of a community tourism assessment and development program. In an on-going partnership with the Montana State University Extension Program, technical expertise will be drawn from numerous public-sector agencies, as well as private-sector consultants. This program is designed to be primarily “self-administering.” With overall direction given by Travel Montana and the Montana State University Program, participating communities will commit to investing the manpower and time necessary to complete the various program steps. In FY97 (the program’s fourth year) work will continue in three communities. A comprehensive, user-friendly “how to” workbook has been developed to assist in the process implementation in future communities.

Included in this comprehensive process is the building of a community profile to include: lifestyle, attitudes toward tourism, current community economic structure, existing asset inventories and long-range community vision. Having identified and prioritized potential tourism projects acceptable to the community, review studies will be administered to gauge a potential project’s social, economic and environmental impacts, both positive and negative. Community organization, project development, marketing and follow-up are all components of the program.

Upon completion of this in-depth eight month tourism assessment process, each of the three communities will be eligible to apply to Travel Montana for a newly established project development grant in an amount up to \$20,000. Approved by the Tourism Advisory Council, this grant program will offer much needed “seed money” for the development of appropriate community-oriented, tourism-related, non-profit project(s).

Education ▼

In close coordination with the Montana State University Extension Program, the Small Business Development Center and various other public-sector agencies offering training and education, Travel Montana will provide coordination and partnership funding to present expanded education opportunities for the private sector of the Montana travel industry. Tourism training courses planned for FY97 include a follow-up workshop series to the very successful Farm & Ranch Recreation workshops presented in 1995 and 1996. Travel Montana will coordinate the planning and implementation of these course offerings in partnership with participating agencies. In addition, Travel Montana will continue to offer technical expertise in such areas as customer service training and tourism publicity, as well as overseas group travel and consumer marketing.

Tourism Infrastructure Investment Program (TIIP) ▼

Montana’s 4% accommodations tax is the funding source for the state Department of Commerce’s Tourism Infrastructure Investment Program. This innovative program will generate grant funding to facilitate the development of new tourism-related products, and the enhancement of existing products in the State of Montana. Under this program, Travel Montana will provide \$350,000 in FY97 in matching grants for tourism-related projects sponsored by nonprofit organizations. This grants program will maintain and strengthen Montana’s role as a competitive visitor destination by investing accommodation tax receipts in Montana’s tourism industry infrastructure. Projects to be encouraged include construction or purchase costs for new buildings, equipment or remodeling/enhancing/preserving existing tourism and recreation attractions, historic sites and artifacts which would have the potential to extend a visitor’s stay in Montana.

FILM INDUSTRY PROMOTION & SERVICES

Travel Montana, through the Film Office, promotes the state as a location for feature films, commercials, television, documentaries, music videos and still photography, and provides information, scouting and support services to the motion picture industry—including producers, directors, location managers and studio executives.

Advertising & Marketing ▼

Specific promotional projects are undertaken by Travel Montana to build and sustain the production community's awareness of the state as a prime filming location.

TRADE MAGAZINE ADVERTISING

Montana ads will be featured in various trade publications such as *AFCI Locations*, *Daily Variety*, *Hollywood Reporter* and *Backstage SHOOT*.

PROMOTIONAL POSTER

One poster will be produced to continue the current series on dramatic Montana locations. It will be distributed at trade shows and as a limited direct mail piece.

CALENDARS

A targeted mailing of Montana calendars featuring Montana locations will be sent to selected producers, directors, studio executives and location managers. These calendars will provide a monthly reminder of the state as a location (November 1996).

Scouting/Industry Liaison ▼

Scouting trips showing producers and other studio personnel possible locations for their upcoming projects are carried out by Travel Montana. When appropriate, Travel Montana works with its industry and regional liaisons to help facilitate this process.

Trade Shows & Film Festivals ▼

Being represented at major industry trade shows and film festivals in the United States and abroad allows Montana the opportunity to increase awareness and knowledge of the state as a film location on a one-to-one basis.

SUNDANCE FILM FESTIVAL

A nationally recognized film festival held in Park City, Utah, where directors, producers and studio executives meet and conduct workshops and screen new independent feature films and documentaries (January 1997).

LOS ANGELES LOCATION EXPO

An annual motion picture location show attracting up to 6,000 major decision makers in both U.S. and foreign markets. This show is sponsored by the Association of Film Commissioners International (February 1997).

SHOWBIZ EXPO WEST

One of the premier trade shows for the motion picture industry, this annual trade show attracts over 30,000 attendees in three days (June 1997).

SHOWBIZ EXPO EAST

An annual trade show for the motion picture industry that gives access to companies based on the East Coast (January 1997).

Fulfillment ▼

Travel Montana responds to requests from producers for information about locations as well as the guidelines, laws and permits regarding shooting in Montana. Turnaround time for information will range from 1 to 24 hours.

MONTANA PRODUCTION GUIDE

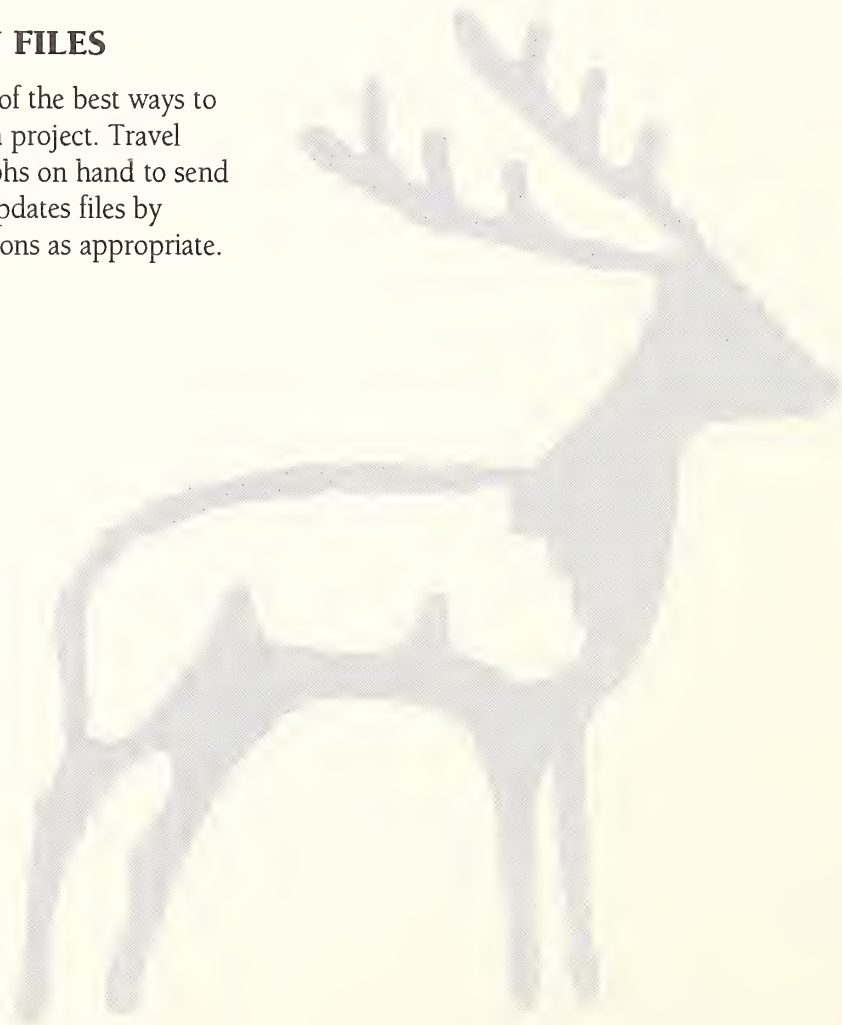
The *Montana Production Guide* is distributed to key decision makers within the motion picture industry. It is an all-encompassing reference for shooting a production in Montana. The 160-plus page guide details the following information: production services and crews; contacts for federal, state, and city agencies; weather data; aircraft charter; and major locations, towns and cities, along with photos of Montana locations. Approximately 2,500 guides are produced every two years.

PHOTO AND INFORMATION FILES

Responding to inquiries quickly is one of the best ways to ensure that Montana is considered for a project. Travel Montana keeps thousands of photographs on hand to send at a moment's notice and continually updates files by photographing both old and new locations as appropriate.

Evaluation Mechanisms ▼

Travel Montana tracks location inquiries and requests as a measurement of the level of interest in the state. The true measure of success, however, is the increasing amount of revenue generated in Montana through motion picture and commercial projects. Production company expenditures are calculated from data collected by the film office from personal interviews and a mailed questionnaire sent at the completion of the project. These figures are then presented in aggregate on an annual basis. Additionally, there are long-term results—building the image of Montana as both a viable location and tourist destination—which are difficult to quantify, but provide a return in the future.



COOPERATIVE MARKETING

Travel Montana regularly seeks involvement in cooperative marketing programs, both with other states and provinces and with private-sector organizations/businesses. Such efforts enhance the appeal of Montana's vacation product and stretch marketing funds for Travel Montana and its co-op partners. Following is a brief overview of some existing ventures.

Private Sector Co-ops ▼

Travel Montana undertakes several efforts open to participation from tourism organizations/businesses. Programs include downhill ski television co-op and Winter Guide advertising, as well as programs using the recently developed electronic projects throughout Travel Montana. Other components of this program are placement of "advertorial" in magazines targeting group tour operators and organizations of journalist familiarization trips in cooperation with Montana's six tourism regions.

Montana/Wyoming National Parks Co-op ▼

This longtime advertising partnership includes the states of Montana and Wyoming, TW Services, Glacier Park Inc. and the Grand Teton Lodge Company (concessionaires at Yellowstone, Glacier and Grand Teton national parks, respectively). The co-ops annual spring/summer magazine campaign featuring Glacier, Yellowstone and Grand Teton national parks is one of the most effective inquiry generators of all Travel Montana's programs.

Trail of the Great Bear ▼

Travel Montana will continue to support the marketing and promotion of this international scenic corridor linking Waterton National Park in Canada to Yellowstone National Park in the United States. In addition to including the Trail of the Great Bear in the overall consumer marketing and travel programs, Travel Montana is a member of both the Trail of the Great Bear Society's Advisory Board and Marketing Committee.

Montana/Alberta, Canada "Passport to Heritage" ▼

Travel Montana and Alberta Community Development have designed a program to promote a "two nation vacation" entitled "Passport to Heritage." The passport program will feature historical sites throughout twelve regions (six in Montana, six in Alberta). The fulfillment piece for this program will consist of a high-quality guide book containing tour maps, regional information and detailed accounts of the featured sites. This is an incentive program that will have a retail-driven promotion. The "passport" will be available for purchase throughout Montana and Alberta at visitor centers, tourist attractions and convenience stores.

RMI—"The Real America" ▼

Montana has seen considerable success in attracting visitors from Germany, United Kingdom, France, the Netherlands, Belgium and Japan through the partnership with Idaho, South Dakota and Wyoming under the Rocky Mountain International (RMI) banner. This program has proven to be extremely cost effective and has won national awards and recognition for its creative approach to marketing this corner of the world in Europe. Significant cost savings are achieved by working together with the other states in reaching the European and Japanese travel markets.

TRAVEL MONTANA MARKETING CALENDAR 1996

| | 1996/JULY | AUGUST | SEPTEMBER | OCTOBER | NOVEMBER | DECEMBER |
|--------------------------------|--|--|---|--|---|--|
| Consumer Advertising | <ul style="list-style-type: none"> Fall Magazine Ads | <ul style="list-style-type: none"> Fall TV Ads- Regina, Spokane, Calgary/Lethbridge, Fargo/ Moorehead, Minot/ Bismarck, Yakima/Tri-Cities, Boise. Ski Montana Magazine Ads | <ul style="list-style-type: none"> Ski Montana Magazine Ads Snowmobile Magazine Ads | <ul style="list-style-type: none"> Ski Montana TV Ads-Idaho, Washington, North Dakota, South Dakota, Minnesota, Wyoming, Regina/ Moosejaw, Lethbridge Ski Montana Magazine Ads Cross-Country Ski Magazine Ads Snowmobile Magazine Ads Ski Montana Roadshows- North Dakota, South Dakota, Canada | <ul style="list-style-type: none"> Ski Montana TV Ads- Idaho, Washington, North Dakota, South Dakota, Minnesota, Wyoming, Regina/ Moosejaw, Lethbridge Ski Montana Magazine Ads Cross-Country Ski Magazine Ads Snowmobile Magazine Ads Ski Montana Roadshows-North Dakota, South Dakota, Canada Winter In-state program | <ul style="list-style-type: none"> Ski Montana TV Ads- Idaho, Washington, North Dakota, South Dakota, Minnesota, Wyoming, Regina/ Moosejaw and Lethbridge Snowmobile Magazine Ads Winter In-state program |
| Trade Advertising & Promotions | <ul style="list-style-type: none"> Media Calendar of Events-Oct 96-Apr 97 Publicity Newsletter and Media Tour Invitations-Direct Mail | <ul style="list-style-type: none"> Tour Operator Direct Mail-Montana Magazine Convention Ads | <ul style="list-style-type: none"> Convention Ads | <ul style="list-style-type: none"> Publicity Newsletter and Media Tour Invitations-Direct Mail Tour Operator Direct Mail-Montana Magazine | <ul style="list-style-type: none"> Convention Ads | <ul style="list-style-type: none"> Convention Ads Tour operator direct mail-Montana Magazine |
| Familiarization Tours | <ul style="list-style-type: none"> Ridin' the Wild West, Missouri River Country (8-15) Southwest Montana Treasures, Gold West Country (15-22) International FAM tours (TBA) | <ul style="list-style-type: none"> Beartooth to Broadus, Custer Country (12-19) | <ul style="list-style-type: none"> Historic Hotels and Fall Foliage, Yellowstone Country (24-29) Tour Operator FAM, statewide International FAM tours (TBA) | | | |
| Tourism Events & Projects | | | <ul style="list-style-type: none"> Domestic group tour operators, statewide (9-14) | <ul style="list-style-type: none"> Tourism Advisory Council Meeting (7-8) | | |
| Sales & Trade Missions | <ul style="list-style-type: none"> Meeting World, New York City (9-11) Meeting Professionals International-Nashville (27-31) | | <ul style="list-style-type: none"> Affordable Meetings-Washington, DC (5-7) Cineposium-Long Beach (15-18) Taipei/Kumamoto Sales Calls (23-27) Japan Trade Mission (Sept 29-Oct 4) | <ul style="list-style-type: none"> RMI Roundup (14-19) Incentive Travel & Meeting Executives (IT&ME)-Chicago (14-18) | <ul style="list-style-type: none"> Paris Sales/Media Seminar (7-8) National Tour Association (NTA) Fall Exchange-Minneapolis (9-14) World Travel Market-London (11-14) | <ul style="list-style-type: none"> America Bus Association (ABA) Marketplace-Portland (9-13) |
| Consumer Travel Shows | | | | | | |
| Publications | <ul style="list-style-type: none"> Montana Travel Update Untold Story Leads-Fall | <ul style="list-style-type: none"> Montana Travel Update Winter Guide Winter Calendar of Events | <ul style="list-style-type: none"> Montana Travel Update | <ul style="list-style-type: none"> Montana Travel Update Untold Story Leads-Winter 1997-98 Group Tour Planning Guide | <ul style="list-style-type: none"> Montana Travel Update | <ul style="list-style-type: none"> Montana Travel Update Montana Production Guide |

TRAVEL MONTANA MARKETING CALENDAR 1997

| 1997/JANUARY | FEBRUARY | MARCH | APRIL | MAY | JUNE |
|--|---|--|--|--|---|
| <ul style="list-style-type: none"> • Spring/Summer Magazine Ads • Ski Montana TV Ads-Idaho, Washington, North Dakota, South Dakota, Minnesota, Wyoming, Regina/Moosejaw, Lethbridge • Montana/Wyoming Co-op Ads | <ul style="list-style-type: none"> • Spring/Summer Magazine Ads • Montana/Wyoming Co-op Ads | <ul style="list-style-type: none"> • Spring/Summer Magazine Ads • Summer TV Ads-core markets: Seattle, Denver, Minneapolis, Salt Lake City • Invite-A-Friend This Summer • Montana/Wyoming Co-op Ads | <ul style="list-style-type: none"> • Spring/Summer Magazine Ads • Summer TV Ads-core markets: Seattle, Denver, Minneapolis, Salt Lake City • Invite-A-Friend This Summer • Montana/Wyoming Co-op Ads | <ul style="list-style-type: none"> • Invite-A-Friend This Summer • Montana/Wyoming Co-op Ads | <ul style="list-style-type: none"> • Invite-A-Friend This Summer • Fall Magazine Ads |
| <ul style="list-style-type: none"> • Media Calendar of Events, Apr-Oct 97 • Publicity Newsletter and Media Tour Invitations-Direct Mail • Convention Ads | <ul style="list-style-type: none"> • Tour Operator Direct Mail-Montana Magazine | <ul style="list-style-type: none"> • Film Office Ads • Convention Ads | <ul style="list-style-type: none"> • Publicity Newsletter and Media Tour Invitations-Direct Mail • Tour Operator Direct Mail-Montana Magazine • Convention Ads • Film Office Ads | <ul style="list-style-type: none"> • Convention Ads • Film Office Ads | <ul style="list-style-type: none"> • Tour Operator Direct Mail-Montana Magazine • Convention Ads • Film Office Ads |
| <ul style="list-style-type: none"> • Winter Media Tour (TBA) | <ul style="list-style-type: none"> • Race to the Sky Media Tour (8-16) • Winter Media Tour (TBA) | <ul style="list-style-type: none"> • Winter Media Tour (TBA) | | <ul style="list-style-type: none"> • Group Travel FAM (TBA) • International FAM tours (TBA) | <ul style="list-style-type: none"> • International FAM tours (TBA) |
| <ul style="list-style-type: none"> • Farm & Ranch Recreation Workshops-sites TBA (Jan/Feb) | <ul style="list-style-type: none"> • Tourism Advisory Council Meeting (3-4) | <ul style="list-style-type: none"> • Governor's Conference on Tourism & Recreation-Helena (20-21) | | <ul style="list-style-type: none"> • Visitor Information Center and Travel Counselor Familiarization Trips, eastern Montana (13-16) western Montana (20-23) | <ul style="list-style-type: none"> • Tourism Advisory Council Meeting (2-3) |
| <ul style="list-style-type: none"> • Showbiz East-New York City (5-7) • Sundance Film Festival-Park City, UT (16-25) • RMI Winter Round-up (TBA) | <ul style="list-style-type: none"> • Swiss Visit USA • Locations '97 Trade Show, -Los Angeles | <ul style="list-style-type: none"> • Brussels Sales Seminars (6-7) • ITB-Berlin (8-12) • Amsterdam Sales Seminars (13-14) | | | <ul style="list-style-type: none"> • Showbiz Expo West-Los Angeles • Pow Wow USA-Nashville (TBA) • Meeting Planner's International (MPI)-Nashville (28-30) |
| | | <ul style="list-style-type: none"> • Northwest Sportshow-Minneapolis (14-23) | | | |
| <ul style="list-style-type: none"> • Montana Travel Update • Untold Story Leads-Spring • Vacation Guide • Travel Planner • Summer Calendar of Events • Highway Map | <ul style="list-style-type: none"> • Montana Travel Update • Fishing Guide • Guide to Indian Reservations Brochure | <ul style="list-style-type: none"> • Montana Travel Update | <ul style="list-style-type: none"> • Montana Travel Update • Quick Reference Guide • Untold Story Leads-Summer | <ul style="list-style-type: none"> • Montana Travel Update | <ul style="list-style-type: none"> • Montana Travel Update |

PLANNED RESEARCH PROJECTS

The overall purpose of the University Travel Research Program, funded by the accommodations tax, is to allow Montana's tourism and recreation industry to make informed decisions about planning, development, management, marketing and economic impact. The Institute for Tourism and Recreation Research (ITRR) at the University of Montana administers the program. The University Travel Research Program is designed to be relevant, practical, timely and responsive to the needs of the industry as a whole. Listed below are the research projects currently approved by the Governor's Tourism Advisory Council and funded by the University Travel Research Program.

Planned Research Projects ▼

RESIDENT AND NONRESIDENT TRAVEL UPDATE

Successful tourism management requires a complete picture of travel activity, including both resident and nonresident travel. Data collection for resident and nonresident travel activity will occur June through September 1996, and will provide updated information on expenditures, length of stay, visitor characteristics and activities.

RESIDENT ATTITUDE AND QUALITY OF LIFE MONITORING

The purpose of this research is to continue monitoring resident attitudes toward tourism and to add the monitoring of quality of life in relationship to tourism. This new dimension of quality of life monitoring allows us to understand tourism's perceived impact on the residents of this state. Resident attitudes have been monitored statewide for three years through a three-question telephone survey. This enhanced study will analyze attitudes and quality of life with a more comprehensive questionnaire.

TOURISM MONITORING

The purpose of this research is to gather secondary data related to travel in Montana and surrounding areas. The role of ITRR is to monitor travel levels and provide trend information to tourism providers, marketers and planners. ITRR has traditionally filled this role by active participation in the Economic Outlook Seminar Series, the Outlook document, the Tourism and Recreation News Briefs, and will now provide a research newsletter to the industry on a quarterly basis.

COMMUNITY TOURISM ASSESSMENT PROCESS

With this research project, ITRR will assist selected Montana communities in assessing their potential for tourism development. In addition to conducting a local survey on resident attitudes toward tourism development, ITRR helps chosen communities interpret existing travel data and collect new data on travel characteristics.

DEFINING AND MEASURING TOURISM SUSTAINABILITY

The purpose of this research is to identify and understand the concept of sustainable tourism around the world to help Montana guide itself in sustainable tourism. After definitions and concepts have been identified, a workshop in each travel region will be conducted to identify indicators in that region of sustainable tourism. The indicators will become part of the workbook which will be designed from the study.

CONVENTION ECONOMIC IMPACTS AND CHARACTERISTICS

Communities around Montana continue to seek conventions and meetings to enhance the economy of the area. National statistics provide economic impact estimates, but no study has been carried out in Montana to know the true value of conventions to the state. The purpose of this study, therefore, is to analyze the statewide convention business in terms of economic impact and convention characteristics in Montana compared in national statistics.

MONTANA FARM AND RANCH VACATION ANALYSIS

Farm and ranch vacations have become a popular form of vacation destination for visitors to Montana. Travel Montana has conducted workshops on farm and ranch vacations for the past two years with incredible interest and attendance. Farm and ranch vacations are seen as an additional form of income for these land owners to help them remain on their land. While farm and ranch vacations are growing in Montana, little is known about these vacation destinations. The purpose of this project, therefore, is to try to identify the number of farms and ranches currently offering vacations and what the business owners need to know to successfully offer vacations on their lands.

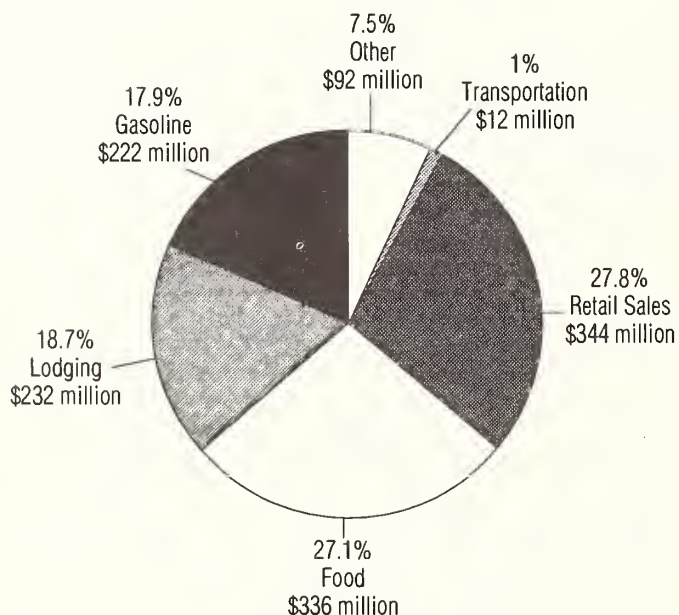
REGIONAL TOURISM RESEARCH

Tourism research conducted by ITRR has always focused on statewide data and significance. Very little inferences can be made to regions or communities, even though local data is continually requested from ITRR. While it is not the mandate of ITRR to conduct local research, localized research is valuable. The purpose of this research, is to provide local/regional data collection on an issue of importance for that area. Fifty percent of the money for this research would come from ITRR and 50 percent from the community or region.

THE IMPORTANCE OF TOURISM

Tourism is one of Montana's most important and promising industries. In fact, travel industry growth over the last decade has outpaced all other natural resource-based basic industries in Montana. It continues to enjoy steady growth. From 1991 to 1995, the number of nonresident visitors to the state increased by 16%, from 6.77 million to 7.9 million visitors. In 1995, those 7.9 million visitors spent an estimated \$1.24 billion in Montana.

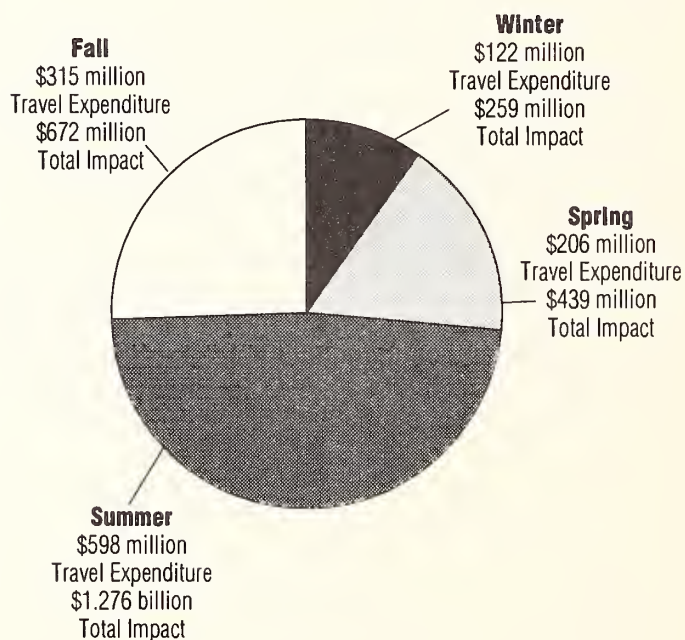
HOW THE NONRESIDENT TRAVEL DOLLAR IS SPENT



*** TOTAL GROSS EXPENDITURES \$1.24 BILLION**

1995 Figures

TRAVEL EXPENDITURES AND TOTAL ECONOMIC IMPACT GENERATED BY SEASON



1995 Figures

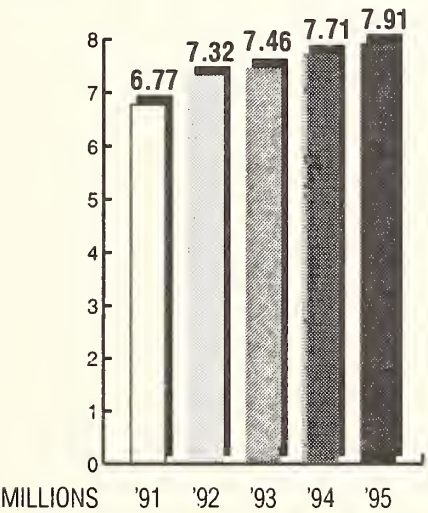
As shown above, visitor expenditures have impacts far broader than the lodging industry, and circulate through a broad cross-section of the Montana economy. *Total economic impact of the travel, tourism and recreation industry to Montana in 1995 (including indirect and induced effects) is estimated at \$2.6 billion.*

In direct benefit to all Montana citizens, visitors to Montana pay many millions of dollars annually into our general and highway funds through various Montana taxes. Nonresident travel expenditures in the state also sustained an estimated 60,000 jobs in Montana in 1995 which were directly or indirectly related to travel. In total, these jobs accounted for \$763 million in payroll.

These measurements represent significant growth since 1991. Visitor expenditures have risen 30%, travel-related or dependent jobs increased by 13% and labor income from tourism has grown by 30%.

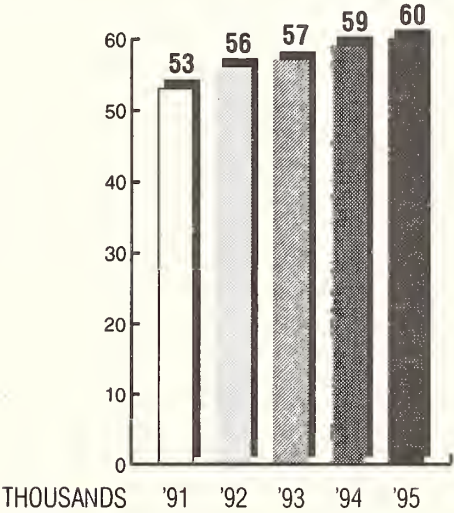
In addition, the filming of movies and commercials in Montana generated income to Montana of \$12 million in 1995.

NONRESIDENT VISITORS UP 16%



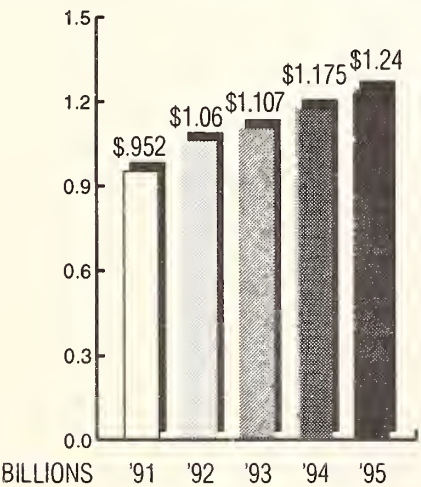
7.9 million people visited Montana in 1995, spending an estimated \$1.2 billion in our state.

TRAVEL-DEPENDENT JOBS UP 13%

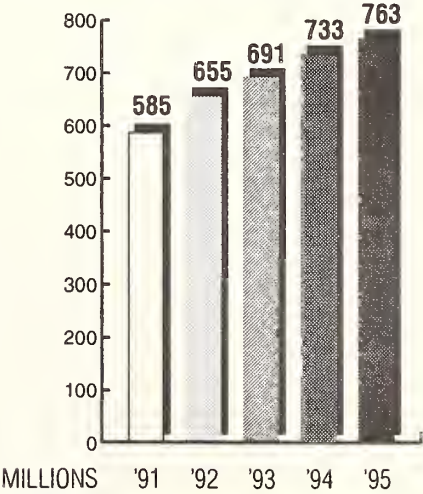


60,000 jobs in Montana are directly or indirectly related to the travel trade—in hotels, restaurants, gas stations, retail stores and more.

VISITOR EXPENDITURES UP 30%



TRAVEL PAYROLL UP 30%



Montana workers earned \$763 million in 1995 from jobs related to nonresident travel.

NONRESIDENT TRAVEL'S ECONOMIC IMPACT

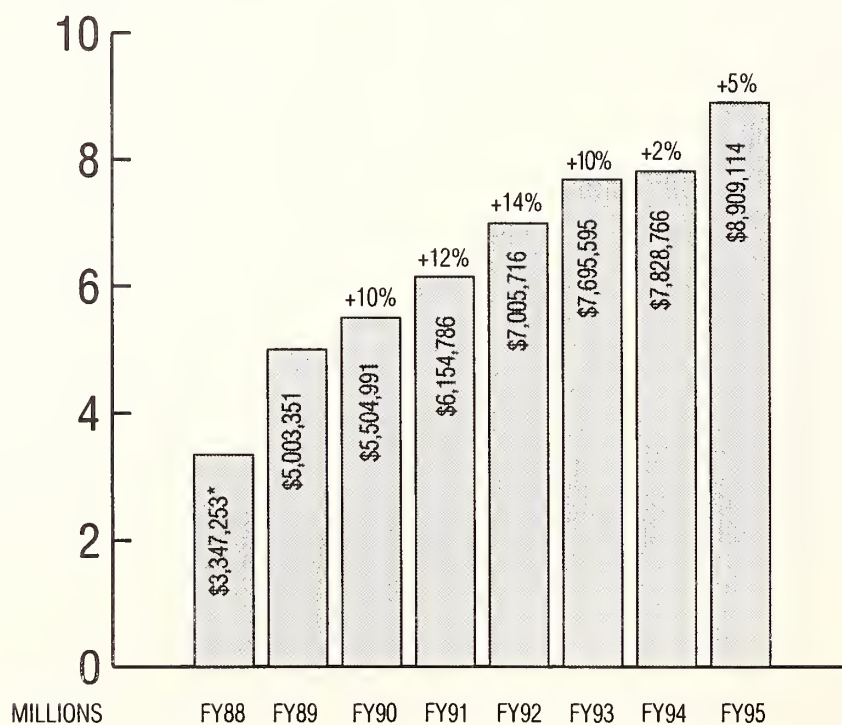
Economic Impact 1995 ▼

| | Direct Impact | Secondary Impact | Total Economic Impact |
|--|----------------|------------------|-----------------------|
| Total Industrial Output | \$1.17 billion | \$1.47 billion | 2.6 billion |
| Employment Compensation (Travel-generated salary and wages) | \$340 million | \$422 million | \$763 million |
| Employment | 32,000 jobs | 29,000 jobs | 60,000 jobs |

Number of Nonresident Visitors 1995 ▼

| Traveler Type | Traveler Groups | Number of Travelers |
|---------------|-----------------|---------------------|
| Highway | 3,173,542 | 7,588,418 |
| Airport | 196,180 | 324,271 |
| Total | 3,369,722 | 7,912,690 |

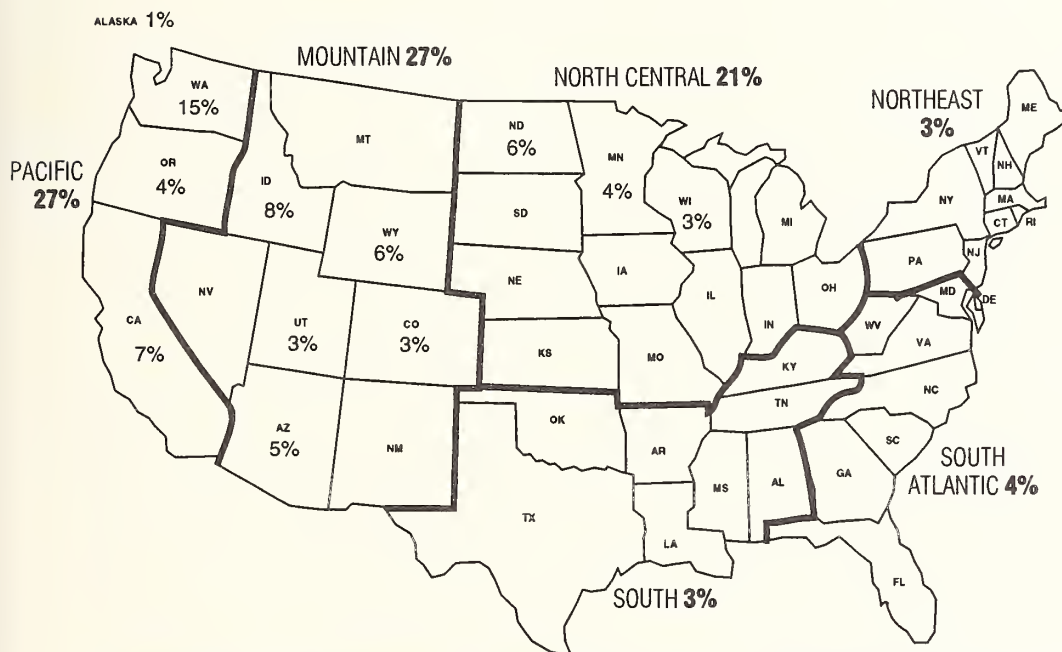
Accommodations Tax Collections ▼



* FY88 reflects only three quarters of revenue collections.

FACTS ABOUT VISITORS

Most highway travelers were from the surrounding states and provinces while air travelers came from a larger geographical area. Most nonresident highway visitors to Montana came from Washington state while most air travelers came from California. The second greatest number of air travelers came from Washington while Alberta and Idaho tied for the second greatest number of highway travelers.



STATES WITH 3% OR MORE VISITATION INDICATED ON MAP.
Totals may not add to 100% due to rounding.

| | |
|-----------------|-----|
| CANADA | 16% |
| Alberta | 9% |
| B.C. | 3% |
| Other Provinces | 4% |
| OTHER COUNTRIES | 2% |

State or Province of Residence (1993)

| Residence* | Highway Travelers | Air Travelers |
|------------------|-------------------|---------------|
| Washington | 15% | 10% |
| Alberta | 9% | * |
| Idaho | 9% | * |
| North Dakota | 7% | * |
| California | 6% | 19% |
| Wyoming | 6% | * |
| Minnesota | 4% | * |
| Oregon | 4% | 3% |
| British Columbia | 3% | * |
| Colorado | 3% | 7% |
| Utah | 3% | 4% |
| Texas | * | 5% |
| Arizona | * | 5% |
| Alaska | * | 3% |
| Wisconsin | * | 3% |
| Florida | * | 3% |
| All Others | 31% | 38% |

(*Only states and provinces greater than or equal to 3% are listed.)

Nonresident highway travelers most often participated in driving for pleasure, looking for and viewing wildlife, and visiting Yellowstone National Park. Air travelers responded that visiting family and friends, driving for pleasure, and looking for and viewing wildlife were the three most common activities participated in while in Montana. Activities related to the natural environment such as nature photography and visiting national forests and parks were very common activities for both types of travel groups.

Activity Participation (1993)

| Activities* | Highway Travelers | Air Travelers |
|-------------------------------|-------------------|---------------|
| Driving for Pleasure | 46% | 42% |
| Looking for, Viewing Wildlife | 41% | 38% |
| Visiting Yellowstone N.P. | 25% | 14% |
| Nature Photography | 25% | 23% |
| Visiting Family and Friends | 22% | 44% |
| Historic/Interpretive Sites | 20% | 16% |
| Visiting Glacier N.P. | 16% | 11% |
| Museums | 15% | 15% |
| Picnicking | 15% | 8% |
| Camping in a Developed Area | 15% | 1% |
| Visiting a National Forest | 14% | 12% |
| Day Hiking | 13% | 15% |
| Recreational Shopping | 8% | 13% |
| Visiting State Parks | 8% | 7% |
| Visiting Other National Parks | 8% | 5% |
| Traveling Historic Trails | 8% | 6% |

Columns do not add to 100% because of multiple responses.

* Only more popular activities are listed.

KEY MARKETING OBJECTIVES

Seven marketing objectives have been set to guide the work of Travel Montana through a strategic planning process completed in the fall of 1992. These objectives fall into four basic categories:

- Economic Benefits & Opportunities for Montanans
- Diversifying the Industry
- Resource Protection
- Tourism Industry Cooperation

The marketing objectives which have shaped Travel Montana's program are:

- Increase visitor expenditures in Montana an average of 5% per year, with emphasis on raising per-visit expenditures and length of stay.
- Increase overall labor income (travel payroll) from the tourism and recreation industry an average of 3%–5% per year.
- Increase in-state expenditures generated from motion picture and commercial productions filmed in Montana.
- Raise labor income (travel payroll) derived from the tourism industry during the fall, spring and winter seasons.
- Increase labor income derived from the tourism industry in less-traveled areas of the state.
- Support tourism development and growth which enhances Montana's natural, historical and cultural resources, and mitigates negative impact.
- Foster cooperation in tourism promotion and development through all sectors of the tourism industry.

TRAVEL MONTANA MISSION STATEMENT

Travel Montana's mission is to strengthen Montana's economy through the promotion of the state as a vacation destination and film location.

By maximizing the combined talents and abilities of its staff, and with guidance from the Governor's Tourism Advisory Council, Travel Montana strives to promote a quality experience to visitors while encouraging preservation of Montana's environment and quality of life.

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